Part No. P0604633 01

Business Communications Manager

Personal Call Manager User Guide

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Preface

Business Communications Manager Personal Call Manager is a TAPI-based application that provides an easy-to-use interface between your computer and your telephone. You use the telephone to speak with a caller. You can customize your Address Book and your calls. Basic functions that Personal Call Manager performs include making and answering calls, putting calls on hold, transfer calls, and making conference calls.

Before you begin

This guide is intended for users who wish to manage their own calls, and who have Personal Call Manager installed on their PC, which is registered with the Business Communications Manager server. This guide assumes that you have the following background:

- Working knowledge of the Windows operating system
- Some experience with windowing systems or graphical user interfaces (GUIs).

Text conventions

This guide uses the following text conventions:

`bold Courier text`	Indicates command names and options and text that you need to enter. Example: Use the **`dinfo`** command. Example: Enter **`show ip`** {**`alerts`**|**`routes`**}.
italic text	Indicates new terms, book titles, and variables in command syntax descriptions. Where a variable is two or more words, the words are connected by an underscore. Example: If the command syntax is `show at <valid_route>`, *`valid_route`* is one variable and you substitute one value for it.
bold text	indicates dialog boxes, buttons and menu options
separator (>)	Shows menu paths. Example: Protocols > IP identifies the IP option on the Protocols menu.

Acronyms

This guide uses the following acronyms:

API	Application Programming Interface
CLID	Calling Line Identification
CTE	Computer Telephony Engine
CTI	Computer Telephony Integration
DND	Do Not Disturb
ERC	Express Routing Code
IP	Internet Protocol
O/S	operating system
PCM	Personal Call Manager
PIN	Personal Identification Number
TAPI	Telephony Application Programming Interface
TSP	TAPI Service Provider
URL	Uniform Resource Locator

Chapter 1
Personal Call Manager

Business Communications Manager Personal Call Manager is a Telephony Application Programming Interface (TAPI)-based application that provides an easy to use computer interface for your telephone.

With Personal Call Manager you can:

- make calls
- redial telephone numbers
- return calls
- answer calls
- put calls on and off hold
- manage multiple calls
- transfer calls
- conference calls
- activate and de-activate Do Not Disturb
- call forward your telephone

Personal Call Manager also has an Address Book that allows you to store the names, addresses, and telephone numbers of your contacts on your computer where they are easy to find and use.

Using a handsfree telephone with Personal Call Manager

Personal Call Manager is a tool designed to accompany your telephone. It provides tools to make processing calls easier, but you must still use your telephone to speak with the caller. For this reason, we recommend that you use a telephone equipped with handsfree. When using a handsfree telephone, you can perform all of the Personal Call Manager functions without picking up the telephone handset.

About this guide

Personal Call Manager provides several ways to perform each task. Although this document describes all of the possible methods, you only need to use one of the methods to perform the task.

Installing Personal Call Manager

Personal Call Manager must be installed on your computer before you can use it. The files required to install Personal Call Manager are on the Business Communications Manager base unit.

To install Personal Call Manager:

1. Exit any Windows programs that are running.
2. On the Unified Manager front page, click on **Install Client**. The Client Install Application page appears.
3. Click on **Personal Call Manager**. The Personal Call Manager page appears.
4. Click on **Install Personal Call Manager**. A file download window appears.
5. Select Save this program to disk and click **OK**. The SaveAs dialog appears.
6. Choose a location to save this file to. Click **Save**. The file begins downloading.
7. When the file is finished downloading, double-click on it. The install application begins.
8. Follow the on-screen instructions.

Note: The installation files for Personal Call Manager are not deleted by the installation wizard. These files are stored in a folder named C:\Program Files\Nortel Networks\ClientInstall\Personnal Call Manager.

You can delete the installation files as they are not needed by Personal Call Manager.

Starting Personal Call Manager

You can start Personal Call Manager from the shortcut icon on the desktop or from the Windows Start button.

To start Personal Call Manager from the shortcut icon:

1. Double-click .

To start Personal Call Manager using the Start button:

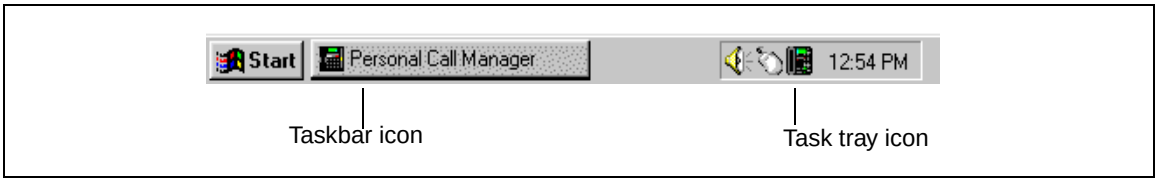
1. Click the **Start** button, point to **Programs**, point to **Personal Call Manager** and then click **Personal Call Manager**.

The Personal Call Manager introduction screen appears briefly. The Personal Call Manager icon is added to the task tray and task bar, and the Personal Call Manager window appears.

Note: When you install Personal Call Manager, the shortcut icon is installed by default.

Personal Call Manager icons

When Personal Call Manager starts up, two icons are added to the screen: the taskbar icon and the task tray icon. These two icons have different tasks. The taskbar icon opens the Personal Call Manager window. The task tray icon gives you access to Personal Call Manager functions when you are using another program. The diagram below shows where these icons are located.



Personal Call Manager task tray icon

The Personal Call Manager icon appears on the right side of the task tray.

When you move the mouse pointer over the Personal Call Manager icon, the number of current calls is displayed. The number displayed includes the active call, conference calls and calls on hold.

When you right-click the Personal Call Manager icon, a menu appears that allows you to exit from Personal Call Manager, set Personal Call Manager options, or open the Personal Call Manager window. The Personal Call Manager window provides access to additional features such as the Address Book.

When you click the Personal Call Manager icon, the task tray menu appears. From the task tray menu you can perform most basic call functions, such as making and answering calls, putting calls on hold, transferring calls and conferencing calls.

Personal Call Manager task tray menu

The Personal Call Manager task tray menu is divided into two main sections. The lower portion of the menu contains the following call control options:

- **Callers List** - a list of the telephone numbers of the last ten calls
- **Redial List** - a list of the last ten telephone numbers you dialed
- **Quick Dials** - a group of telephone numbers you want quick access to
- **Transfer** - allows you to transfer the active call to another telephone
- **Manual Dial** - allows you to call someone by entering their telephone number on the computer keyboard
- **DND** - turns the Do Not Disturb feature on or off

The upper portion of the menu contains the current calls. Each of these calls has an icon beside it to indicate the status of the call. If there are currently no calls, the upper portion of the menu does not appear.

	Active Call	Appears beside the call you are currently on.
	Held Call	Appears beside calls that are on hold. Any call that is not active is on hold.
	Conference Call	Appears beside the two calls that you are connected to when you are on a conference call.
	Held Conference	Appears beside conference calls that are on hold.
	Ringing	Appears beside calls that are ringing.

Personal Call Manager window

From the Personal Call Manager window you can perform all of the functions of the Personal Call Manager task tray icon as well as access the Address Book, the Help files and Personal Call Manager setup.

Opening the window

When you start Personal Call Manager, the window appears. If you do not want the window to appear when you start Personal Call Manager, refer to “Changing the Startup Option” on page 84. When you change this option, the window is minimized to an icon on the taskbar when you start Personal Call Manager. You can also minimize the window at anytime by clicking the minimize button in the top right corner of the window.

To maximize the window:

- click the Personal Call Manager icon in the taskbar

  or

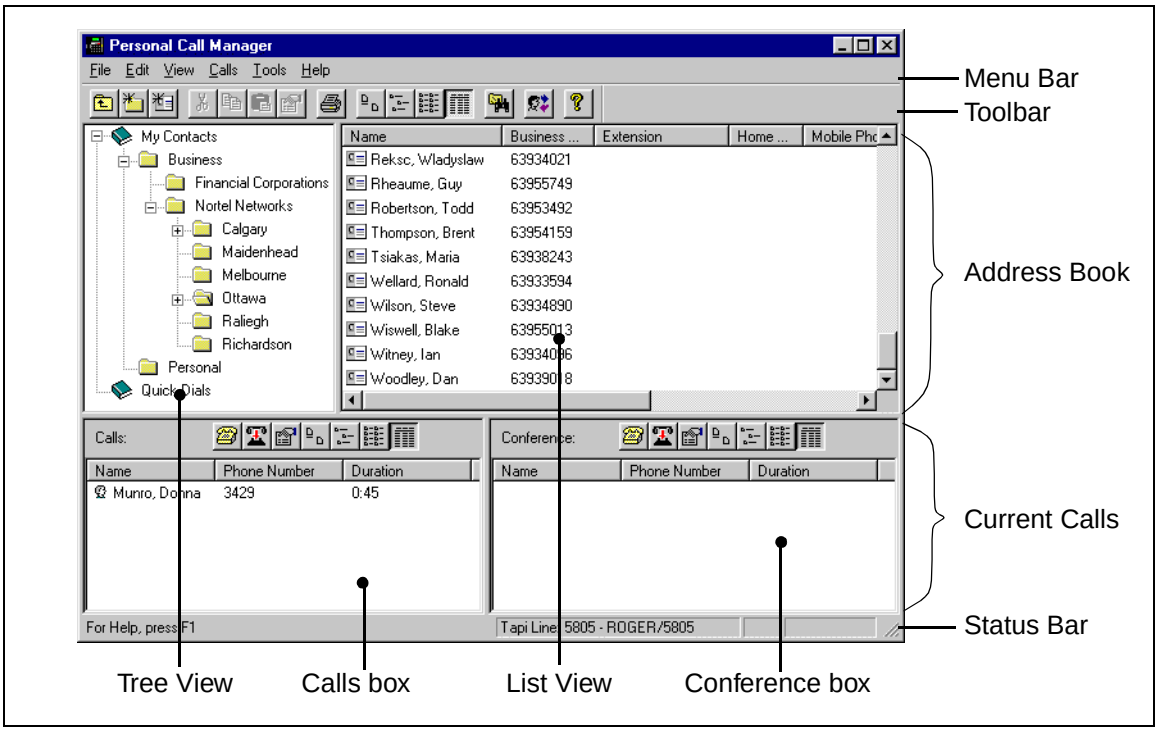
- right-click the Personal Call Manager icon in the task tray and click **Open**.

Components of the window

The Personal Call Manager window shows the following:

- the Menu bar
- the toolbar
- the address book
- the current calls
- the status bar

All of these components, except the Menu bar, can be turned on or off to suit your needs.



Menu bar

The Menu bar shows the menus available from the window. From these menus you can access all of the features available from Personal Call Manager. The Menu bar is always visible on the window.

One of the menus on the Menu bar is the Calls menu. The items on the Calls menu are identical to the items on the Personal Call Manager task tray menu.

Toolbar

The toolbar contains several buttons that provide quick and easy access to Personal Call Manager functions.

Displaying the toolbar

To display the toolbar:

1 Click the **View** menu and then click **Toolbar**.
The toolbar toggles between being displayed and not being displayed. When the toolbar is set to be displayed, 4 appears beside the **Toolbar** menu item in the **View** menu.

Using the toolbar

The toolbar buttons provide access to commonly used features.

	Up One Level	Exits from the current directory and moves one level up in the contact tree.
	New Folder	Adds a new folder to the Address Book.
	New Contact	Adds a new contact to the Address Book.
	Cut	Copies the selected folder or contact onto the clipboard and deletes it.
	Copy	Copies the selected folder or contact onto the clipboard.
	Paste	Copies the folder or contact stored on the clipboard to the selected folder.
	Properties	Displays the Address Properties dialog box if a contact is selected or the Folder Property dialog box if a folder is selected.
	Print	Prints information about the currently selected contact. If a folder is selected, prints information about all of the contacts in the folder.
	Large Icons	Displays the folders and contacts in the Address Book in large icons.
	Small Icons	Displays the folders and contacts in the Address Book in small icons.
	List	Displays the folders and contacts in the Address Book in small icons organized in vertical columns.
	Detail	Displays the folders and contacts in the Address Book in a report view format. In this format the icon, first name, last name, telephone numbers, and email information of the contact appears.
	Find Person	Displays the Search dialog box. The Search dialog box is used to find a particular contact within the Address Book.
	Calls Log	Displays the Calls Log Window. This window shows all of the calls made or received while Personal Call Manager was operating.
	About	Displays a dialog box containing information about the Personal Call Manager software such as the software version.

Address Book

The Address Book is a list of all the contacts stored in Personal Call Manager. The Address Book consists of two parts:

- the Tree View which shows the structure of your folders
- the List View which shows the folders and contacts stored in the currently selected folder

For more information about the Address Book, refer to "Address Book" on page 55.

Displaying the Address Book

To display the Address Book:

1 Click the **View** menu and then click **Only Address Book** to display only the Address Book.

or

1 Click the **View** menu and then click **Both Address Book and Calls** to display both the Address Book and the Current Calls.

The symbol • appears beside the current selection.

Current Calls

The Current Calls section of the screen shows which calls are active. The Current Calls section consists of two parts:

- the Calls box which shows the calls that are currently on your telephone
- the Conference box which shows the conference calls that are currently on your telephone.

Displaying the Current Calls

To display the Current Calls:

1 Click the **View** menu and then click **Only Calls** to display only the Current Calls.

or

1 Click the **View** menu and then click **Both Address Book and Calls** to display both the Address Book and the Current Calls.

The symbol • appears beside the current selection.

Current Calls icons

There are several icons that are used in the Current Calls section. Each icon is used to represent a call. The icons also show the status of the calls.

	Active Call	Appears beside the call you are on.
	Held Call	Appears beside calls that are on hold. Any call that is not active is on hold.
	Conference Call	Appears beside the two calls that you are connected to when you are on a conference call.
	Held Conference	Appears beside conference calls that are on hold.
	Ringing	Appears beside the calls that are ringing.

Current Calls Toolbar

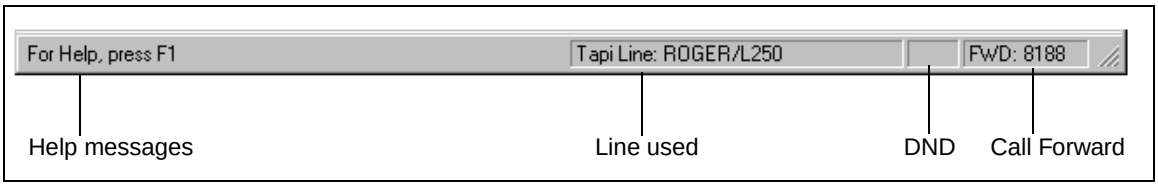
Above the Calls box and the Conference box are toolbars that you use to control the calls or change how the calls are displayed.

	Manual Dial	Displays the Dial dialog box. This dialog box allows you to call someone who is not in the Address Book.
	Release	Hangs up the selected call. If only there is only one call, that call is automatically selected.
	Properties	Displays the Notes tab of the Address Properties dialog box for the selected call. If the selected call is not in the Address book, a message appears asking if you want to add this caller.
	Large Icons	Displays the current calls or conference calls in large icons.
	Small Icons	Displays the current calls or conference calls in small icons.
	List	Displays the current calls or conference calls in small icons organized in vertical columns.
	Detail	Displays the current calls or conference calls in a report view format. In this format the icon, caller's name, telephone number and call duration appears. The duration is a running count of how many minutes the call has been connected.

Status bar

The Status bar is at the bottom of the screen and provides four information message areas:

- Help messages – Shows a help message, if available, for the area the mouse pointer is pointing on. For example, if the pointer is on one of the buttons on the toolbar, the message describes what the button does.
- Line used – Identifies which telephone line is being used by Personal Call Manager.
- DND – The acronym DND appears if the Do Not Disturb (DND) feature is turned on for your telephone.
- Call Forward – Indicates if Call Forward is activated, and to which number your telephone is call forwarded.



Displaying the Status bar

To display the Status bar:

1. Click the **View** menu and then click **Status Bar**.
   The Status bar toggles between being displayed and not being displayed. When the Status bar is set to be displayed, 4 appears beside the Status Bar menu item.

Closing the window

To close the window, click the minimize button in the top right corner of the window. The window is minimized to an icon on the taskbar.

When you close the window, call control features are still available from the Personal Call Manager icon in the task tray.

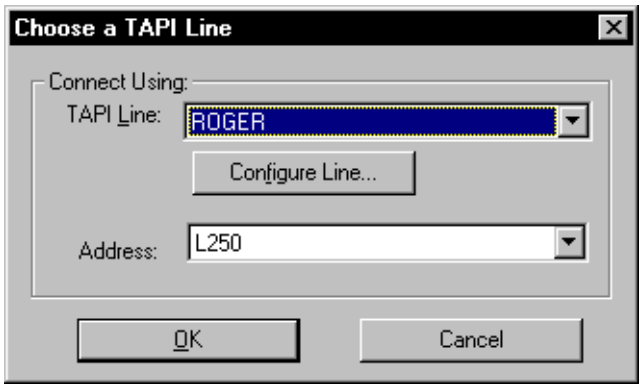
Setting up Personal Call Manager

Before you can use Personal Call Manager you must choose the TAPI line that will be used and define the dialing properties.

Defining the line used

If there are several lines available, you can choose which line Personal Call Manager uses to make calls. To choose a line:

1 Click the **Tools** menu and then click **Dial Using**.
The Choose a TAPI Line dialog box appears.



2 Click the **TAPI Line** list box.

3 Click the line Personal Call Manager uses.

4 Click the **Address** list box.

5 Click the address for the line you chose.

6 Click the **OK** button.

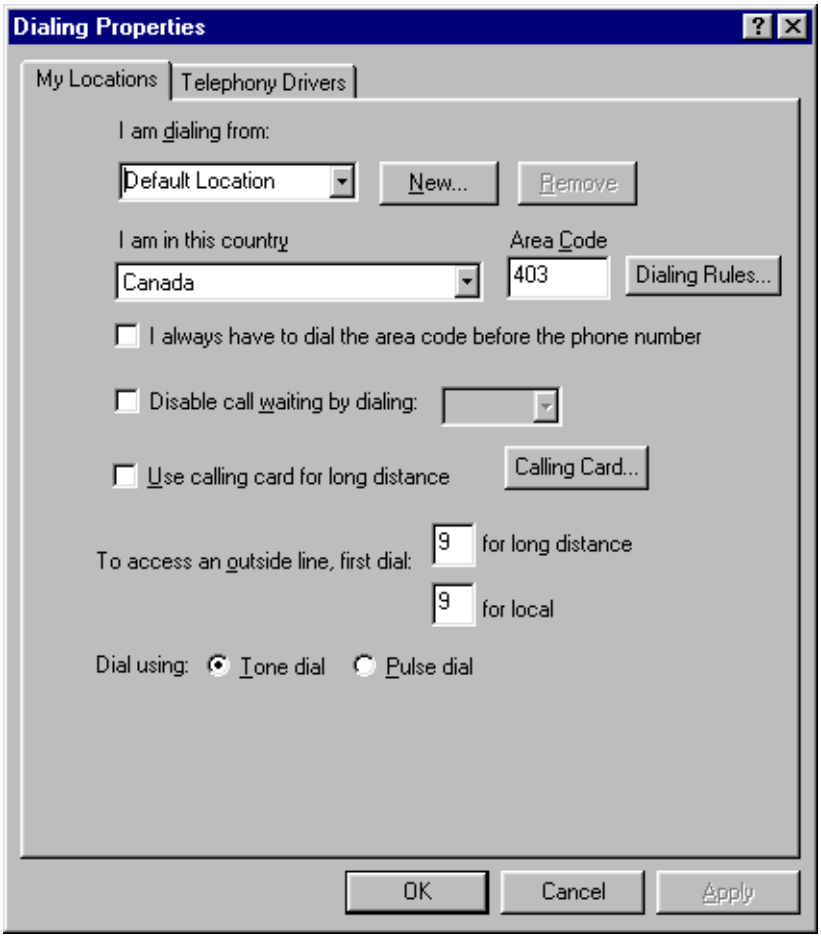
Note: When using the Business Communications Manager TSP, the name of the TAPI line is the same as the extension name for your telephone.

Changing the dialing properties

Note: The following description and screen are samples. The screen you see displayed will contain similar information but the presentation may vary depending on the version of the Windows operating system you are using. Refer to the Windows documentation that came with your system for further specifications.

You use the Dialing Properties to define where you are situated and what is required to dial from this location. To access dialing properties:

1 Click the **Tools** menu and then click **Dialing Properties**.
The Dialing Properties dialog box appears.



From the Dialing Properties dialog box you can control these options:

- the location you are dialing from (I am dialing from)
- the country you are in (I am in this country)
- the area code you are dialing from (Area Code)
- if you are using a calling card (Use a calling card for long distance)
- the number used to disable Call Waiting (Disable call waiting by dialing)
- access to lines (To access an outside lines)
- the type of dialing system (Dial using)

I am dialing from

Use the I am dialing from list box to save different sets of dialing properties. You can use I am dialing from when you have a computer (such as a laptop) that you use at different locations. You can save the settings for the different locations under different names in the I am dialing from list box. You can then quickly change to the new settings when you switch locations.

For example, you can have a laptop computer that you use at both the north and south locations. If the north and south locations have different dialing requirements (such as call waiting in the north but not in the south), you can set up two different sets of dialing properties in the I am dialing from list box. Then, when you switch locations, you can change the dialing properties by changing the name that appears in the I am dialing from list box.

Creating a new location

When you create a new location, you are creating the name that is used to access the new set of dialing properties. After you create the location, any changes made to Dialing Properties dialog box are saved with this name.

To create a new location:

1. Click the **New** button.
   A dialog box appears confirming that a new location was created.
2. Select the text in the **I am dialing from** list box.
3. Type the name of the new location.
4. Change the other parameters on the **Dialing Properties** dialog box to match the dialing properties required for this location.
   These fields are described later in this section.
5. Click the **Apply** button to store the changes with the new location.

Selecting a location

When you select a location, all of the dialing properties are changed to the settings that are stored for that location.

To select a location:

1. Click the button in the **I am dialing from** list box.
   A list of locations appears.
2. Click the location you are currently at.
   The dialing properties are changed to the setting stored for this location.

Deleting a location

When you no longer need a location, you can delete it from the list of locations.

To delete a location:

1. Click the button in the **I am dialing from** list box.
   The list of locations appears.
2. Click the location you want to delete.
3. Click the **Remove** button.
   A confirm deletion dialog box appears.
4. Click the **Yes** button.

I am in this country

This field defines the country of the you are currently in.

To select a country:

1. Click the **I am in this country** list box.
2. Scroll through the list of countries.
3. Click the country you are in.

Note: You can scroll quickly through the list of countries by typing the first few letters of the country's name. As you type, the list finds the country that matches the letters you type.

Area Code

The Area Code box defines the area code you are currently in. Personal Call Manager uses the number in this field to determine if a call is a local call (to the same area code) or a long distance call.

To enter an area code:

1 Select the characters in the **Area Code** box and type the area code.

In some locations, the area code must always be added when dialing a telephone number. To make Personal Call Manager include the area code, select the **I always have to dial the area code before the phone number** check box.

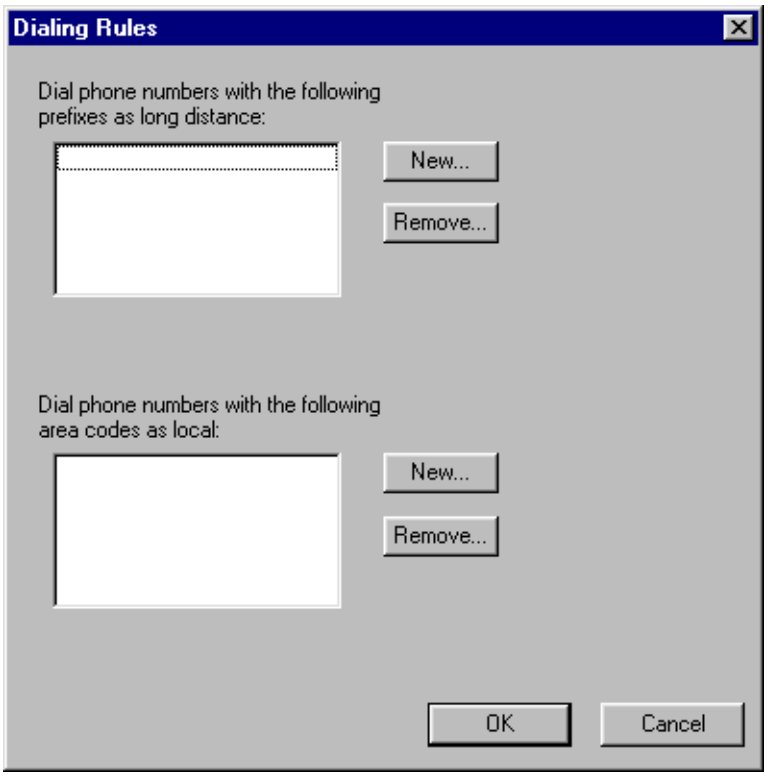
Dialing Rules

In some locations, calls within the same area code are considered long distance calls. These calls require the country code and area code (e.g. 1-403) to be added to the front of the telephone number before they are dialed.

The Dialing Rules feature allows you to define the prefixes (e.g. 222-xxxx) that are long distance calls in your area code.

To set the prefixes that are long distance:

1 Click the **Dialing Rules** button.
The **Dialing Rules** dialog box appears.



To add a prefix that is considered long distance

1. Click the **New** button located in the top half of the dialog box.
   The New Area Code and Prefix dialog box appears.
2. Type the prefix and click the **OK** button.

To delete a prefix that is considered long distance

1. Click the prefix you want to delete.
2. Click the **Remove** button.

To add a prefix that is considered local

1. Click the **New** button located in the bottom half of the dialog box.
   The New Area Code and Prefix dialog box appears.
2. Type the prefix and click the **OK** button.

To delete a prefix that is considered local

1. Click the prefix you want to delete.
2. Click the **Remove** button.

Use a calling card for long distance

Select this check box if you want to use a calling card for long distance telephone numbers. The Calling Card button lets you define which calling card you are using.

To use a calling card:

1. Select the **Use calling card for long distance** check box.
   If you have previously set up a calling card, the settings for that calling card are used.
   If you have not set up a calling card, refer to "Setting up a calling card".

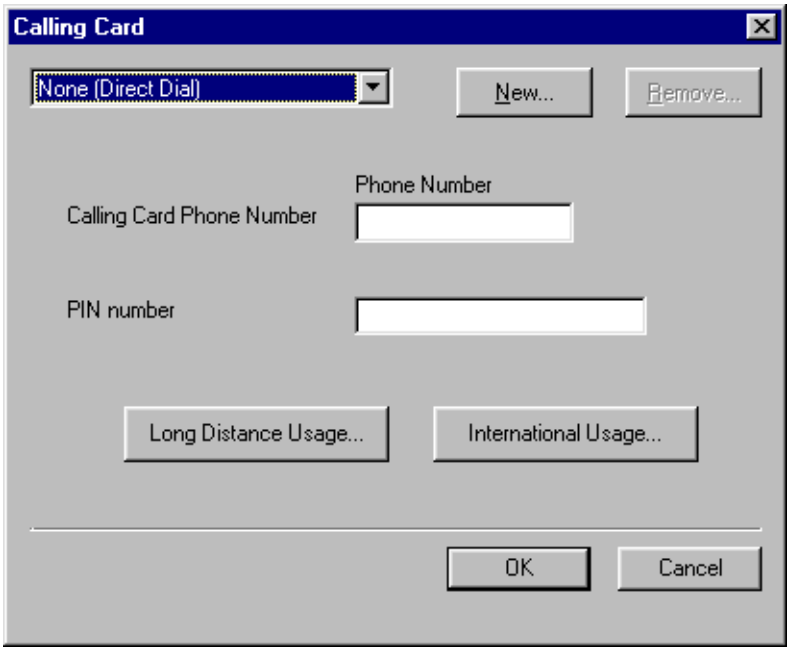
To stop using a calling card:

1. Clear the **Use calling card for long distance** check box.

Setting up a calling card

You must set up the calling card parameters before you can use a calling card. To set up a calling card:

1 Click the **Calling Card** button.
The Calling Card dialog box appears.



2 Click the list box at the top of the dialog box.

3 Scroll through the list to find the calling card you are using and then click the calling card.

Note: If the calling card you are using is not on this list, refer to "Adding a custom calling card" on page 26.

4 In the **Calling Card Phone Number** box, type the calling card telephone number.

5 In the **PIN number** box, type the calling card PIN number.

6 Click the **OK** button.

Adding a custom calling card

The dialing parameters for some calling cards are already configured in Personal Call Manager and appear in the list of calling cards. If the calling card you are using is not on the list of cards, you must set up how to use your calling card.

To add a custom calling card:

1 Click the **Calling Card** button.
The Calling Card dialog box appears.

2 Click the **New** button.
The Create New Calling Card dialog box appears.

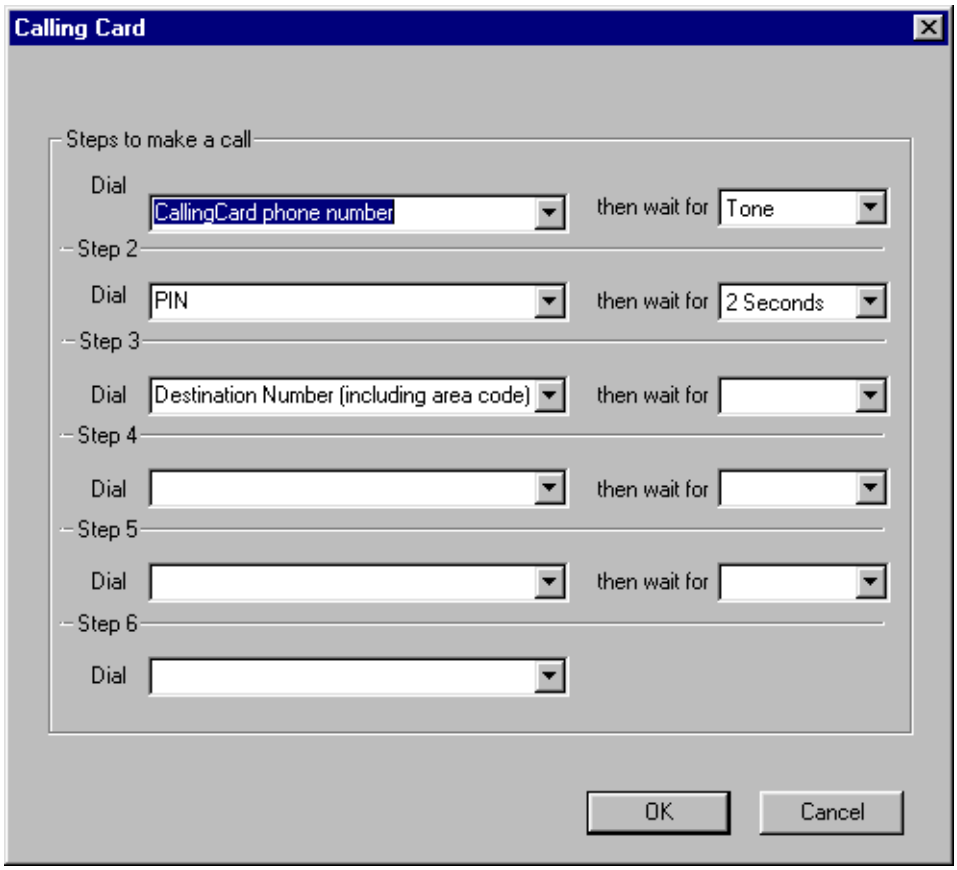
3 Type the name of the calling card and click the **OK** button.
A message appears informing you that you must set up the dialing rules for the new calling card.

4 Click the **OK** button.

5 In the **Calling Card Phone Number** box, type the calling card number.

6 In the **PIN number** box, type your calling card PIN number.

7 Click the **Long Distance Usage** button.
A second Calling Card dialog box appears.



8 Click the first **Dial** list box and then click the first set of numbers that must be dialed.

9 Click the next **Dial** list box and then click the next set of numbers to be dialed.
Repeat step 9 until you have completed all of the steps needed to make a call using your calling card.

Note: Refer to the documentation that came with your calling card for the sequence of steps that are required with your card.

10 When all of the required steps are added, click the **OK** button.

11 Click the **International Usage** button.

12 Repeat steps 8 to 11 to add the steps required to make an international call.

13 Click the **OK** button to return to the **Dialing Properties** dialog box.

Disable call waiting by dialing

If call waiting is available for the current location, use this field to define the numbers required to disable call waiting. Your telephony application uses these numbers to disable call waiting when required.

To enter the numbers required to disable call waiting:

1 Select the **Disable call waiting by dialing** check box.

2 From the **Disable call waiting by dialing** list box select the appropriate disable call waiting code.
If the appropriate code does not appear in the list, type the disable call waiting code in the list box.

To identify that call waiting is not used, clear the **Disable call waiting by dialing** check box.

To access outside lines

There are two boxes for accessing outside lines. The first box is for the digits required to access local numbers and the second box is for the digits required to access long distance lines. These access numbers are required if you are using a line pool or call routing to make calls. These numbers are the same numbers you dial if you are making an outside call from your telephone.

If you do not dial an extra number (e.g. 9) when making a call from your telephone, leave these boxes blank.

To change the outside line access numbers:

1 In the **for long distance** box, type the number required to access an outside line for a long distance call.

2 In the **for local** box, type the number required to access an outside line for a local call.

Dial using

Use these options to choose tone dialing signals or pulse dialing signals when making a call. To select pulse dialing, click the **Pulse dial** option. To select tone dialing, click the **Tone dial** option.

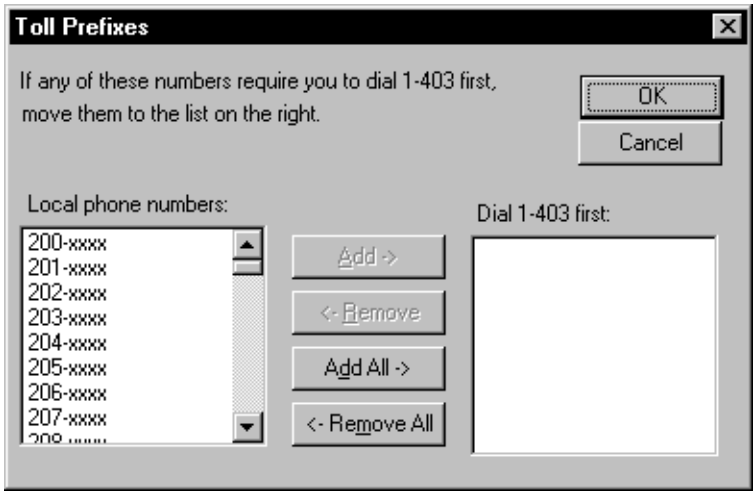
Defining long distance numbers in your area code

In some locations, calls within the same area code are considered long distance calls. These calls require the country code and area code (e.g. 1-403) to be added to the front of the telephone number before they can be dialed.

The Toll Prefixes feature allows you to define the prefixes (e.g. 222-xxxx) that are long distance calls in your area code.

To define toll prefixes:

1 Click the **Tools** menu and then click **Toll Prefixes**.
The Toll Prefixes dialog box appears.



2 From the list of prefixes in the **Local phone numbers** select the prefix that requires an area code added.

3 Click the **Add->** button.

4 Repeat steps 3 and 4 for each prefix that requires an area code added.

Note: If you add a prefix to the Dial first list that does not require an area code, remove it by clicking the prefix and clicking the <-Remove button.

5 When you have finished moving all of the prefixes that require an area code, click the **OK** button.
The Toll Prefixes dialog box closes.

The Toll Prefixes feature is available only if the country you choose in the Dialing Properties dialog box has a country code of 1. For more information about dialing properties, refer to "Changing the dialing properties" on page 21.

Making a call

Using Personal Call Manager, you can make a call using the Calls menu, the Personal Call Manager task tray menu, the toolbar, or the Address Book. When you make a call, the Ringing icon appears in the Calls box, the Personal Call Manager task tray menu and the Calls menu. When the call is answered, the icon changes to the Active Call icon. Both the Ringing and the Active icons have a label that is used to identify the call.

If you make a call using the Address Book, the name in the Address Book is used as the label for the call.

If you manually dial the telephone number, Personal Call Manager compares the number dialed to the numbers stored in the Address Book. If a match is found, the name from the Address Book is used as the label. If no match is found, the number dialed is used as the label.

Making a call using the Address Book

Before you can call a number from the Address Book, you must add the number to the Address Book. For more information about adding numbers to the Address Book, refer to "Adding a new contact to the Address Book" on page 57.

To make a call using the right mouse button:

1. Look in the Address Book to find the icon of the person you want to call.
2. Right-click the icon. Point to **Dial** and click the telephone number you want to dial for the person (e.g. the contact's Business number).

You can use the drag and drop feature to make a call. To make a call using the drag and drop method:

1. Look in the Address Book to find the icon of the person you want to call.
2. Use the right mouse button to drag the icon into the Calls box.
3. Click the telephone number you want to dial for the person (e.g. the contact's Business number).

To call the prime telephone number using the Address Book:

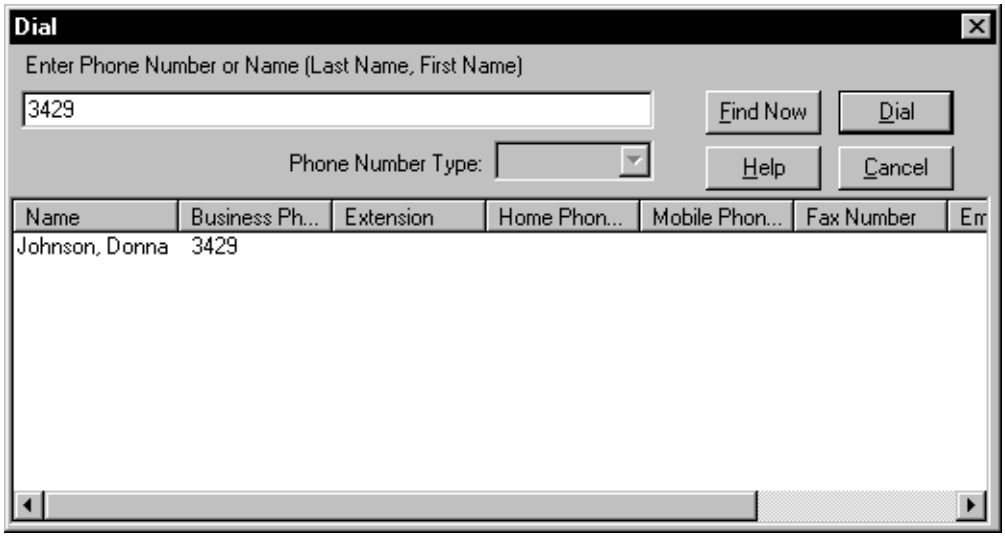
1. Look in the Address Book to find the icon of the person you want to call.
2. Make the call by double-clicking on the icon or dragging the icon to the Calls box.

Note: When you add a contact, you define one of the telephone numbers as the prime number.

Making a call using the task tray or Calls menu

To make a call:

1 Click the Personal Call Manager task tray icon or the **Calls** menu and then click **Manual Dial**. The Dial dialog box appears.



2 Type the telephone number you want to dial.

If you have the Search Option set to Fast Search, Personal Call Manager compares the number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom of the dialog box. To dial one of these contacts, click the contact you want to call. The default number appears in the Phone Number Type list box. To choose a different number, from the **Phone Number Type** list box select Business, Home, or Mobile.

3 Click the **Dial** button.

If you want to call a contact in the Address Book and you remember only the contact's name, enter the contact's name in the **Enter Phone Number or Name** box. If you are using Fast Search, any contacts that match the name you are entering appear in the bottom of the dialog box. If you are using Slow Search you must click the **Find Now** button to find the contacts.

For more information about Search Options, refer to "Changing the Search preferences" on page 83.

You can open the Dial dialog box using two other methods:

1 Press the **F3** key.

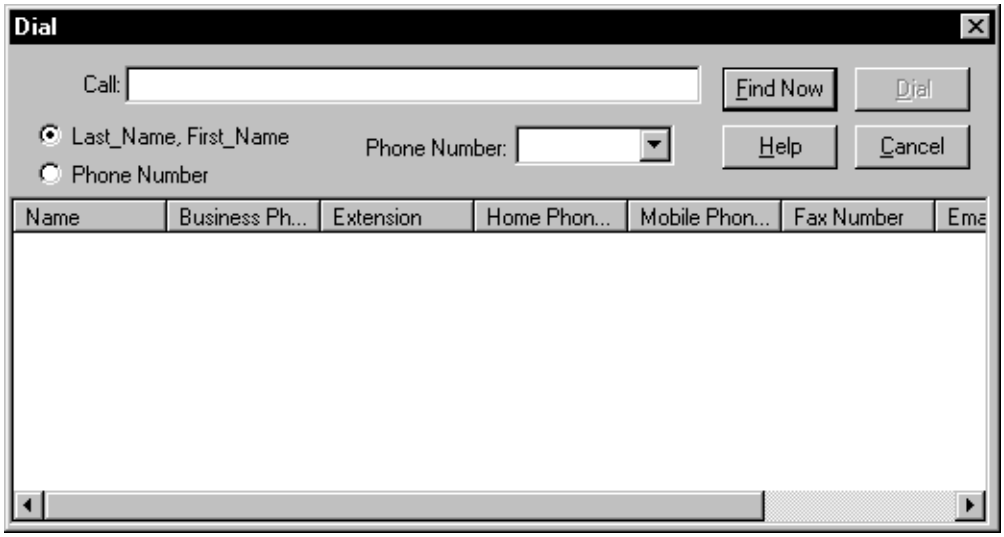
or

1 Click the Personal Call Manager task tray icon or the **Calls** menu, point to **Quick Dials** and then click **Other**.

Making a call using the toolbar

To make a call using the toolbar:

1 Click .
The Dial dialog box appears.



2 Enter the telephone number you want to dial.

If you have the Search Option set to Fast Search, Personal Call Manager compares the number you are entering to the contacts stored in the Address Book. Any contacts that match the number you are entering appear in the bottom of the dialog box. To dial one of these contacts, click the contact you want to call. The default number appears in the **Phone Number Type** list box. To choose a different number, from the **Phone Number Type** list box select Business, Home, or Mobile.

3 Click the **Dial** button.

If you want to call a contact in the Address Book and you remember only the contact's name, enter the contact's name. If you are using Fast Search, any contacts that match the name you are entering appear in the bottom of the dialog box. If you are using Slow Search you must click the **Find Now** button to find the contacts.

For more information about Search Options, refer to "Changing the Search preferences" on page 83.

You can open the Dial dialog box using two other methods:

1 Press the **F3** key.

or

1 Click the Personal Call Manager task tray icon or the **Calls** menu, point to **Quick Dials** and then click **Other**.

Redialing a number

Personal Call Manager keeps a list of the last ten telephone numbers you called. The most recent call is at the top of the list and the oldest call is at the bottom. When there are ten calls on the list and you make another call, the new call is added to the top of the list and the oldest call is deleted. If you call a number that is on the list, the number does not appear on the list a second time. The number is moved from its previous location to the top of the list.

To redial one of the last ten telephone numbers:

1. Click the **Personal Call Manager** icon on the taskbar or the **Calls** menu and then point to **Redial List**.
2. Click the number you want to redial.

Returning a call

Personal Call Manager keeps a list of the telephone numbers of the last ten people who called you. The Callers List shows both the calls you answered and the calls you were unable to answer. You can use this list to return the calls.

The calls on the Callers List are numbered from one to ten. Call number one is the most recent call and is stored at the top of the list. Call number ten is the oldest call and is stored at the bottom of the list. When there are ten calls on the list and you receive another call, the new call is added to the top of the list and the oldest call is deleted. If you receive a call from a number that is on the list, the number does not appear on the list twice. The number is moved from its previous location to the top of the list.

Telephone numbers appear on the Callers List if:

- you subscribe to a Caller ID (CLID) service.

  or

- you receive an internal call through Business Communications Manager.

To return a call:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu and then point to **Callers List**.
2. Click the number of the person you want to call.

Calling from the Quick Dial list

Before you can call a number from the Quick Dial list, you must add the number to the Quick Dials. For more information about Quick Dials, refer to "Quick Dials" on page 80.

To call one of the numbers from the Quick Dial list using the Address Book:

1. Click the **Quick Dials** icon in the Tree View portion of the Address Book.
   The icons of all the Quick Dials appear in the List View of the Address Book.
2. Drag the icon of the contact you want to call into the Calls box.

To call one of the numbers from the Quick Dial list using the Personal Call Manager task tray or Calls menu:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu and then point to **Quick Dials**.
2. Click the icon of the person you want to call.

Answering a call

Knowing when someone is calling

Personal Call Manager notifies you when there is an incoming call. When someone calls you, the You Have a New Call dialog box appears, and the Ringing icon appears in the Calls box, the Personal Call Manager task tray menu and the Calls menu. If you subscribe to a Caller ID service, or you are receiving an internal call through Business Communications Manager, the name or number of the caller appears below the icon and in the You Have a New Call dialog box.

Knowing who is calling

When a call is made or received, an icon appears in the Calls box, Calls menu, and Personal Call Manager task tray menu. These icons are given a label to help identify who is on the call. The information on the label depends on several factors.

If you subscribe to a Caller ID service, Personal Call Manager compares the received number to the numbers stored in the Address Book. If a match is found, the name from the Address Book appears with the Active Call icon. If a match is not found, the name sent with the Caller ID information appears. If a match is not found and a name is not sent with the Caller ID information, the telephone number appears.

If no Caller ID information is available, or you do not subscribe to this service, the word Unknown is used as the label.

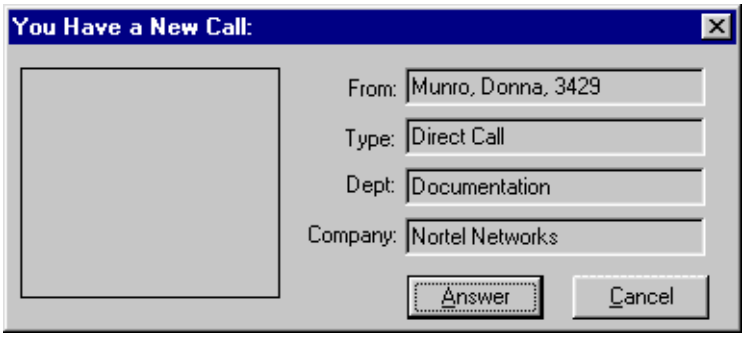
Internal calls show the name of the contact stored in the Address Book if available. When there is no name for the caller in the Address Book, the Business Communications Manager extension name appears.

Displaying who is calling from the task tray

When you click the Personal Call Manager icon in the task tray, the current calls appears at the top of the menu. If you subscribe to a Caller ID service or you are receiving an internal call through Business Communications Manager, the name or number of the caller appears beside the icon. To perform a function on one of the current calls, point at the name or number of the caller and a menu appears.

Answering a call using the You Have a New Call dialog box

Personal Call Manager displays the **You Have a New Call** dialog box when you receive a call.



If you subscribe to Caller ID services, information about the caller appears in the You Have a New Call dialog box.

Table 1 You Have a New Call descriptions

Heading	Description
From	If the caller is one of the contacts in your Address Book, the name and telephone number you assigned to this contact in your Address Book appears in this box. If the caller is not one of your contacts, the name and/or telephone number supplied by the Caller ID service appears in this box.
Type	A short description of how the call was routed to your extension. The type can be: • Direct Call - the caller dialed your telephone number or extension • Forward Busy - the caller was forwarded to you from a busy extension • Forward No Answer - the caller was forwarded to you from an extension that was not answered • Forward Unconditionally - the caller was forwarded from an extension that has all calls forwarded to your telephone • Pick Up From Another Ext - you used the Call Pickup feature to answer this call • Retrieved As a Parked Call - you used a Call Park Retrieval code to answer this call • Redirect To This Stn - the caller was forwarded to you from another extension • Transferred - the caller was transferred to you from another extension • Reminder - the caller was returned to your extension • Unknown - the Caller ID information is unknown and cannot be displayed • Unavailable - the Caller ID information is unavailable and cannot be displayed
Dept	If the caller is one of the contacts in your Address Book, the Department name you assigned to this contact in your Address Book appears in this box. If the caller is not one of your contacts, this box is empty.
Company	If the caller is one of the contacts in your Address Book, the Company name you assigned to this contact in your Address Book appears in this box. If the caller is not one of your contacts, this box is empty.

Also, if the caller is one of the contacts in your Address Book and you assigned a picture or voice announce message to the contact, a small picture appears in the dialog box and a voice announce message plays. For more information about adding contacts to the Address Book, refer to "Adding a new contact to the Address Book" on page 57.

To answer a call using the **You Have a New Call** dialog box:

1 Click the **Answer** button.

Note: The Cancel button cancels only the You Have a New Call dialog box, not the call. If you click the Cancel button, the You Have a New Call dialog box closes but the call continues to ring on your telephone.

Answering a call from the window

To answer the call:

1 Double-click the Ringing icon.
The icon changes to the Active Call icon and the call is answered.

or

2 Right-click the Ringing icon in the Calls box and then click **Answer**.

Answering a call from the task tray or Calls menu

To answer a call:

1 Click the Personal Call Manager task tray icon or the **Calls** menu and then point to the label of the call.

2 Click **Answer**.

Accessing the Notes tab

After you have answered the call, you can display the Notes tab of the Address Properties dialog box. Use the Notes tab to record information about the contact, such as recent orders, meeting locations, etc. For instructions about adding information to the Notes tab, refer to "Note" on page 63.

To display the Notes tab:

1 Click the icon of the caller.

2 Click .

Putting a call on hold

When a call is put on hold, the icon for the call changes from the Active Call icon to the Held Call icon. For information about the various icons, refer to "Personal Call Manager task tray menu" on page 13 and "Current Calls icons" on page 18.

Putting a call on hold using the window

To put a call on hold:

1. Make or answer the call.
2. Right-click the icon of the call in the **Calls** box and then click **Hold**.

Putting a call on hold using the task tray or Calls menu

To put a call on hold:

1. Make or answer the call.
2. Click the **Personal Call Manager** task tray icon or the **Calls** menu, point to the call you want to put on hold and click **Hold**.

Answering a held call using the window

To answer a held call:

1. Right-click the icon of the call in the **Calls** box and then click **UnHold**.

Answering a held call using the task tray or Calls menu

To answer a held call:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu and then point to the caller you want to talk to.
2. Click **UnHold**.

Multiple calls

Personal Call Manager can control several calls at once. The maximum number of calls is equal to the maximum number of lines available. All of the calls currently connected appear on the Personal Call Manager task tray menu, the Calls menu, and the window.

Although several calls can be controlled, only one call can be active at any time, except if you have a conference. In a conference, you can have two active calls. When you answer a held call, the currently active call is automatically put on hold. This allows you to switch between held calls simply by answering the caller you want to talk to.

Switching between calls using the window

On the window, the currently connected calls appear in the Calls box. The currently active call shows the Active Call icon while the rest of the calls show the Held Call icon.

To switch to a different call:

1. Double-click the icon of the caller you want to talk to.

   or

2. Right-click the icon of the caller you want to talk to and then click **UnHold**.

Switching between calls using the task tray and Call menus

On the Personal Call Manager task tray menu and the Calls menu, the currently connected calls appear at the top of the menu. The currently active call shows the Active Call icon while the rest of the calls show the Held Call icon.

To switch to a different call:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu, point to the caller you want to talk to and then click **UnHold**.
   The caller you point to becomes the active call and the other call is put on hold.

Transferring a call

Personal Call Manager allows you to transfer a call to a different telephone. You can transfer the call with an announcement or without. With an announcement, you are calling the person you are transferring the call to before you transfer the call. Use announcements to inform the person who the caller is and why they are calling.

Note: Transferring your telephone to an external telephone number is not supported.

Transferring a call without an announcement

When you transfer a call without an announcement, you are transferring without checking if the person is available to answer the call. This is also known as a blind transfer.

Transferring a call using the window

To transfer a call:

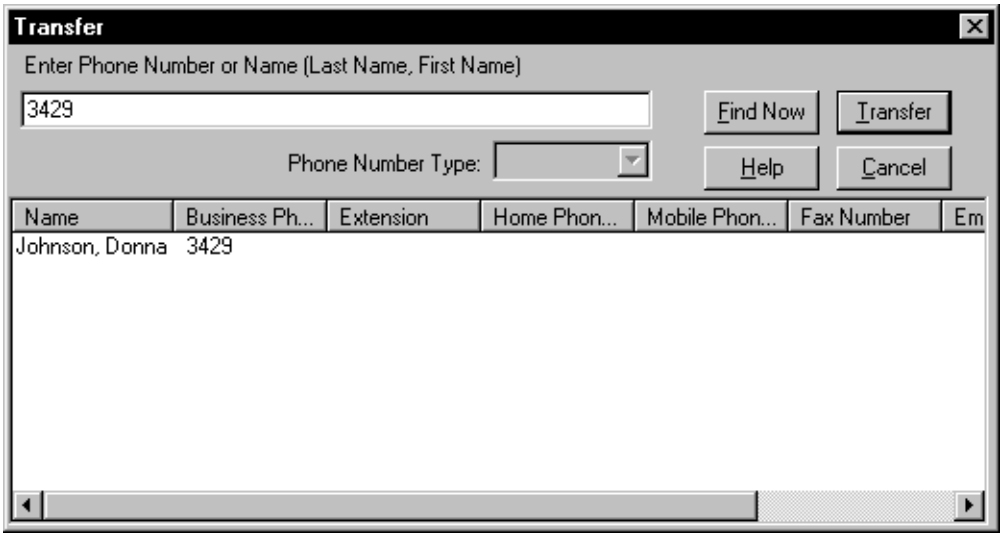
1. Make or answer the call.
2. Drag the icon of the call to another call icon in the **Calls** box or to a contact icon in the Address Book.

   If you are transferring the call to a contact in the Address Book, the contact must be showing in the List View portion of the Address Book. For information about finding a contact, see "Finding a contact in the Address Book" on page 64.

Transferring a call using the right mouse button

You can use the right mouse button and the icons on the window to transfer a call. To transfer a call:

1. Make or answer the call.
2. Right-click the icon in the **Calls** box and then point to **Transfer**.
   A menu of the current calls appears.
3. Click one of the current calls.
   The call is transferred to the person selected.
   If the person you want to transfer the call to does not appear on the list of current calls, perform steps 4 and 5.
4. Click **Other**.
   The Transfer dialog box appears.



5 Type the telephone number of the person you want to transfer the call to and click the **Transfer** button.
The call is transferred to the number entered.

Note: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: If you want to call a contact that is in the Address Book and you remember only the contact's name, type the contact's name.

Note: If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: If Slow Search is enabled, you must enter the name and then click the Find Now button. Any contacts that match the name you entered appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: For information about Fast and Slow Search, see "Changing the Search preferences" on page 83.

Transferring a call using the task tray or Calls menu

To transfer a call:

1. Make or answer the call.
2. Click the **Personal Call Manager** task tray icon or the **Calls** menu and then point to **Transfer**. A menu of the current calls appears.
3. Click one of the current calls.
   The call is transferred to the person selected.
   If the person you want to transfer the call to does not appear on the list of current calls, perform steps 4 and 5.
4. Click **Other**.
   The **Transfer** dialog box appears.
5. Type the telephone number of the person you want to transfer the call to and click the **Transfer** button.
   The call is transferred to the number entered.

Note: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: If you want to call a contact that is in the Address Book and you only remember the contact's name, type the contact's name.

Note: If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: If Slow Search is enabled, you must enter the name and then click the Find Now button. Any contacts that match the name you entered appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: For information about Fast and Slow Search, see "Changing the Search preferences" on page 83.

Transferring a call using the keyboard

You can use the keyboard and the icons on the window to transfer a call. To transfer a call:

1. Make or answer the call.
2. Click the icon in the **Calls** box.
3. Press the **F4** key.
   The Transfer dialog box appears.
4. Enter the telephone number of the person you want to transfer the call to and click the **Transfer** button. The call is transferred to the number entered.

Note: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: If you want to call a contact that is in the Address Book and you remember only the contact's name, type the contact's name.

Note: If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: If Slow Search is enabled, you must enter the name and then click the Find Now button. Any contacts that match the name you entered appear in the bottom of the dialog box. Click the contact you want and click the Transfer button.

Note: For information about Fast and Slow Search, see "Changing the Search preferences" on page 83.

Transferring a call with an announcement

When you transfer a call with an announcement, you are calling the person you are transferring the call to before you transfer the call. Calling the person first allows you to check if the person is available and give that person information about the call.

Transferring a call with an announcement using the window

To transfer a call:

1. Make or answer the call.
2. Put the call on hold.
3. Call the person you are transferring the call to.
4. Give the person any pertinent information about the call.
5. Drag the icon of the call you are transferring to the Active Call icon.

Transferring a call with an announcement using the right mouse button

You can use the right mouse button and the icons on the window to transfer a caller. To transfer a call:

1. Make or answer the call.
2. Put the call on hold.
3. Call the person you are transferring the call to.
4. Give the person any pertinent information about the call.
5. Right-click the icon in the Calls box and point to **Transfer**.
   A menu of the current calls appears.
6. Click the icon of the person you are transferring.

Transferring a call with an announcement using the task tray or Calls menu

To transfer a call:

1. Make or answer the call.
2. Put the call on hold.
3. Call the person you are transferring the call to.
4. Give the person any pertinent information about the call.
5. Click the **Personal Call Manager** task tray icon or the **Calls** menu and then point to the **Transfer** menu item.
   A menu of the current calls appears.
6. Click the icon of the person you are transferring (the first call you made or answered).

Conferencing a call

In a conference call you connect yourself and two other people onto a single call.

Creating a conference

To create a conference you must have at least two lines, one for each caller. These two lines can be external lines or internal lines.

Creating a conference using the Conference box

To create a conference:

1. Make or answer the two calls you want to connect in a conference call.
2. Drag the icon of the first call from the **Calls** box to the **Conference** box.
3. Drag the icon of the second call from the **Calls** box to the **Conference** box.
   The icons for the two calls change to Conference icons.

Creating a conference using the Calls box

To create a conference:

1. Make or answer the two calls to be connected in a conference call.
2. Right-click the icon of the first call to be connected in a conference call and then click **Conference**.
3. Right-click the icon of the second call to be connected in a conference call and then click **Conference**.
   The icons for the two calls move to the Conference box and their icons change to Conference icons.

Creating a conference using the task tray or Calls menu

To create a conference:

1. Make or answer the two calls to be connected in a conference call.
2. Click the Personal Call Manager task tray icon or the **Calls** menu.
3. Point to the first call to be conferenced and then click **Conference**.
4. Click the **Personal Call Manager** task tray icon or the **Calls** menu.
5. Point to the second call to be conferenced and then click **Conference**.
   The icons for the two calls change to the Conference icon.

Putting conferences call on hold

When you put a conference on hold, both calls are put on hold. Neither caller can speak to you but the two callers can speak to each other.

Putting the conference calls on hold using the window

To put the conference calls on hold:

1. Right-click one of the calls in the **Conference** box and then click **HoldConf**.
   The calls are put on hold and the icons change to Held Conference icons.

Putting conference calls on hold using the task tray or Calls menu

To put the conference calls on hold:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu, point to one of the calls in the conference and then click **HoldConf**.
   The calls are put on hold and the icons change to Held Conference icons.

Taking a conference off hold

There are two ways to take a conference off hold:

Restoring a held conference using the window

To cancel hold on a conference:

1. Right-click one of the calls in the **Conference** box and then click **UnHoldConf**.
   The calls in the conference become active and the icons change to Conference icons.

Restoring a held conference using the task tray or Calls menu

To cancel hold on a conference:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu, point to one of the calls in the conference and then click **UnHoldConf**.
   The calls in the conference become active and the icons change to Conference icons.

Splitting a conference

When you split a conference, the conference is ended, but both calls remain connected. One of the callers becomes the active call and the other caller is put on hold. The conference ends and the two callers can no longer speak to each other.

Splitting a conference using the window

To split a conference using the window:

1. Drag one of the icons from the **Conference** box.

The call whose icon you remove from the Conference box becomes the active call and the other call is put on hold. The icons for both calls move to the Calls box.

You can also use the right mouse button and the icons on the window to split a conference. To split a conference:

1. Right-click one of the icons in the **Conference** box and then click **Split Conf**.
   The caller you select becomes the active call while the other caller is put on hold. The icons for both calls move to the Calls box.

Splitting a conference using the task tray or Calls menu

To split a conference:

1. Click the **Personal Call Manager** task tray icon or the **Calls** menu, point to the icon of one of the callers in the conference and then click **Split Conf**.
   The caller you select becomes the active call and the other caller is put on hold.

Ending a conference

When you end a conference, you remove yourself from the conference and let the other two callers continue to talk to each other. While the other callers are talking to each other they are still using two of your telephone lines.

If you want to end the conference and disconnect both the callers, split the conference and end each of the calls.

Ending a conference using the release button

To end a conference:

1 Click the icon of one of the conference calls in the **Conference** box.

2 In the **Conference** box, click .

Ending a conference using the window

To end a conference:

1 Right-click one of the icons in the Conference box and then click **Release Conf**.
The conference ends.

Ending a conference using the keyboard

To end a conference:

1 Click one of the icons in the Conference box.

2 Press the **Delete** key on your PC keyboard.
The conference ends.

Note: When you use the keyboard to end a call, make sure you click one of the icons in the Conference Box before you press the Delete key. If you do not and a contact in the Address Book is highlighted, the contact is deleted. To retrieve a contact that is accidentally deleted, click the Edit menu and then click Undo.

Ending a conference using the task tray or Calls menu

To end a conference:

1 Click the **Personal Call Manager** task tray icon or **Calls** menu and then point to the icon of one of the calls in the conference.

2 Click **Release Conf**.
The conference ends.

Ending a call

Ending a call using the release button

To end a call:

1 Click the icon of the call in the **Calls** box.

Note: If there is only one call in the Calls box, you do not need to select the call.

2 In the **Calls** box, click .

Ending a call using the window

To end a call:

1 Right-click the icon of the call in the **Calls** box and then click **Release**.

Ending a call using the task tray or Calls menu

To end a call:

1 Click the **Personal Call Manager** task tray icon or the **Calls** menu, point to the call you want to disconnect and then click **Release**.

Ending a call using the keyboard

To end a call using the keyboard, the Personal Call Manager window must be visible.

To end a call:

1 Click the icon of the call in the **Calls** box.

2 Press the **Delete** key on your PC keyboard.

Note: When you use the keyboard to end a call, make sure you click the icon in the Calls box before you press the Delete key. If you do not and a contact in the Address Book is highlighted, the contact is deleted. To retrieve a contact that is accidentally deleted, click the Edit menu and then click Undo.

Calling features

Personal Call Manager gives you easy access to two common calling features: Do Not Disturb and Call Forward.

Do Not Disturb (DND)

When DND is enabled, the telephone does not ring when someone calls, but the line indicator flashes. In Personal Call Manager, the You Have a New Call dialog box appears and the icon for the call appears in the Calls box.

You can turn the Do Not Disturb (DND) feature on or off from the Calls menu or the Personal Call Manager icon in the task tray.

Turning DND on or off

To turn DND on or off:

1 Click the **Personal Call Manager** task tray icon or the **Calls** menu and then click **DND**.

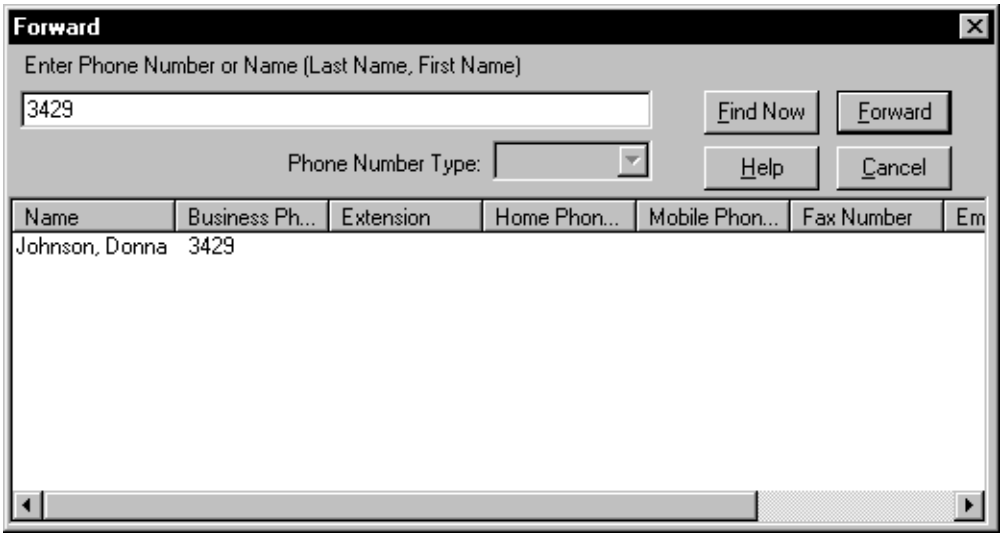
When DND is on:

- the Personal Call Manager task tray icon changes to
- a check mark appears beside the DND menu item on the Calls menu and the Personal Call Manager task tray menu
- DND appears in the Status bar

Call Forward

To call forward your telephone:

1 Click the **Tools** menu and then click **Forward**.
The Forward dialog box appears.



2 Type the telephone number you want to call forward your telephone to.

3 Click the **Forward** button.

The number your telephone is forwarded to appears on the "Status bar".

Note: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom of the dialog box. Click the contact you want and click the Forward button.

Note: If you want to forward your telephone to a contact that is in the Address Book and you remember only the contact's name, enter the contact's name.

Note: If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom of the dialog box. Click the contact you want and click the Forward button.

Note: If Slow Search is enabled, you must type the name and then click the Find Now button. Any contacts that match the name you enter appear in the bottom of the dialog box. Click the contact you want and click the Forward button.

Note: For information about Fast and Slow Search, see "Changing the Search preferences" on page 83.

Note: Call forwarding your telephone to an external telephone number is not supported.

Calls Log Window

The Calls Log consists of two parts: the Incoming Calls Log and the Outgoing Calls Log. The Incoming Calls Log shows all of the calls that were made to your telephone. The Outgoing Calls Log shows all of the calls you made from your telephone. Calls made or received while Personal Call Manager was not operating do not appear.

The Calls Log shows the name and telephone number of the caller, if available. The Calls Log also shows the date and time the call was made and how long the call was.

Viewing the Calls Log

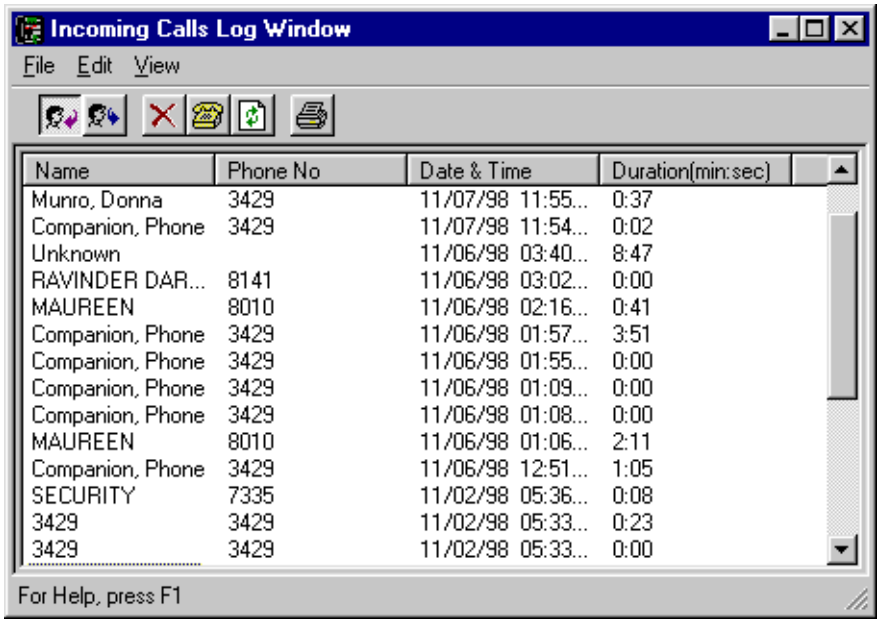
To view the Calls Log:

1 Click .

or

1 Click the **Tools** menu and then click **Show Call Log Window**.

The Calls Log window appears with either the Incoming Calls showing or the Outgoing Calls showing.



Viewing the Incoming Calls

To view the Incoming Calls:

1 Click on the Toolbar.

or

1 Click the **View** menu and then click **Incoming Calls Log**.

Viewing the Outgoing Calls

To view the Outgoing Calls:

1 Click .

or

1 Click the **View** menu and then click **Outgoing Calls Log**.

Updating the Calls Log

If you make or answer a call while the Calls Log is open, the Calls Log is not updated. To update the Calls Log:

1 Click .

or

1 Click the **View** menu and then click **Refresh**.

Sorting the Calls Log

You can sort the Calls Log by name, telephone number, duration, or date and time.

- To sort the Calls Log by the name of the caller, click **Name**.
- To sort the Calls Log by the telephone number of the caller, click **Phone No**.
- To sort the Calls Log by the length of the call, click **Duration**.
- To sort the Calls Log by time the call was made or received, click **Date & Time**.

Making a call from the Calls Log

You can call any of the numbers stored in the Incoming or Outgoing Call Log. To make a call:

1 Click the number you want to dial.

2 Click .

or

1 Click the number you want to dial.

2 Click the **Edit** menu and then click **Redial**.

Note: The appropriate call resource must be assigned as the TAPI Line before you can make a call from the Calls Log.

For example, the TAPI line cannot be an intercom line, if you want to make a call to an external telephone number.

Printing call information from the Calls Log

You can print the Calls Log information for any call in the Calls Log.

To print the Calls Log information:

1 Click the call you want to print.

Note: You can select several calls to print by holding down the Control or Shift key and clicking other calls.

2 Click .

or

Click the **Edit** menu and then click **Print**.

Deleting calls from the Calls Log

To delete a call from the Calls Log:

1 Select the call you want to delete.

2 Click .

or

1 Click the **Edit** menu and then click **Delete**.

Closing the Calls Log Window

To close the Calls Log Window:

1 Click the **File** menu and then click **Exit**.

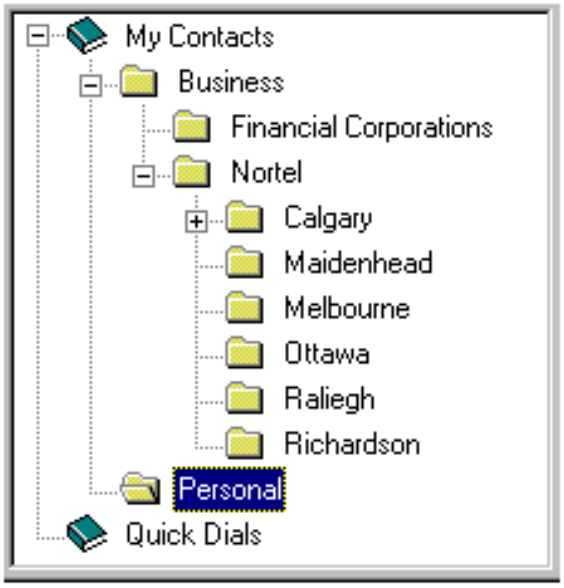
You can also close the Calls Log Window by clicking the **Close Window** button in the upper right corner of the window.

Address Book

The Address Book is the portion of Personal Call Manager where you store telephone numbers and addresses of the people and businesses you deal with. Each entry in the Address Book is called a contact. A contact is normally the telephone number of a person or business, but it can be any number you want to keep track of or store in Personal Call Manager.

The Tree View of the Address Book

When you view the Address Book, the left side shows the tree structure of the Address Book. The tree structure shows how the folders are organized. It also lets you select the folder you want to view. A sample tree view appears below.



The contacts are stored in two main areas:

- Quick Dials – Contacts added to the Quick Dials section appear on the Calls menu and the Personal Call Manager task tray menu. You can add contacts to the Quick Dials section, but not folders.
- My Contacts – Contacts added to the My Contacts section do not appear in the Calls or Personal Call Manager task tray menu, but can easily be accessed from the Address Book. In the My Contacts section, you can add contacts and folders.

Folders are added to help organize the contacts. By grouping the contacts into smaller groups of similar contacts, the contacts are easier to view on the screen and easier to find and access.

You can change which folders appear by clicking certain portions of the Tree View. Clicking a box with “+” in it expands the folder and shows the folder’s contents. Clicking a box with “-” in it collapses the folder and hides the folder’s contents. Double-click a folder to open or close the folder. When a folder is open, the contents of the folder appear in the List view portion of the Address Book.

The List View portion of the Address Book

On the right side of the screen is the List View of the Address Book. The List View shows the contacts and folders stored in the folder selected in the Tree View.

The List View of the Address Book can be viewed in four different formats: large icons, small icons, list, and detail.

Displaying the Address Book in large icons

If you select large icons, each contact appears with the last name of the contact below the icon.

To view in large icons:

- Click .

  or

- Click the **View** menu and then click **Large Icon**.

Displaying the Address Book in small icons

If you select small icons, the contacts appear horizontally with the last name of each contact on the right of the icon.

To view in small icons:

- Click .

  or

- Click the **View** menu and then click **Small Icon**.

Displaying the Address Book in list view

If you select list view, the contacts appear vertically with the last name of each contact on the right of the icon.

To view in list view:

- Click .

  or

- Click the **View** menu and then click **List**.

Displaying the Address Book in details view

If you select details view, the last name, first name, telephone numbers you can call and Email Address and Email type are shown for each contact.

To view in details view:

- Click .

  or

- Click the **View** menu and then click **Detail**.

Contacts

A contact is any entry in the Address Book. A contact can be a person, business, or any number or address you want stored in Personal Call Manager.

Adding a new contact to the Address Book

You add contacts using the Address Properties dialog box.

To add a contact using the toolbar:

1. Click .
   The **Address Properties** dialog box appears.
2. Enter the address information for this contact.
   For descriptions of the address fields, refer to "Address Properties dialog box" on page 58.
3. Click the **OK** button.

Note: If a contact with the same name is in the Address Book, a message appears asking if you want to make a duplicate. If you want to make a duplicate of a contact, use the copy method described in "Copying a contact" on page 68.

The contact is added to the folder shown in the List View of the Address Book.

To add a contact using the right mouse button:

1. Right-click in an open area in the List view portion of the Address Book.
2. Point to **New** and then click **Contact**.
   The Address Properties dialog box appears.
3. Type the address information for this contact.
   For descriptions of the address fields, refer to "Address Properties dialog box" on page 58.

4 Click the **OK** button.

Note: If a contact with the same name is in the Address Book, a message appears asking if you want to make a duplicate. If you want to make a duplicate of a contact, use the copy method described in "Copying a contact" on page 68.

The contact is added to the folder shown in the List View of the Address Book.

To add a contact using the Menu bar:

1 Click the **File** menu, point to **New** and then click **Contact**.
The Address Properties dialog box appears.

2 Type the address information for this contact.
For descriptions of the address fields, refer to "Address Properties dialog box" on page 58.

3 Click the **OK** button.

Note: If a contact with the same name is in the Address Book, a message appears asking if you want to make a duplicate. If you want to make a duplicate of a contact, use the copy method described in "Copying a contact" on page 68.

The contact is added to the folder shown in the List View of the Address Book.

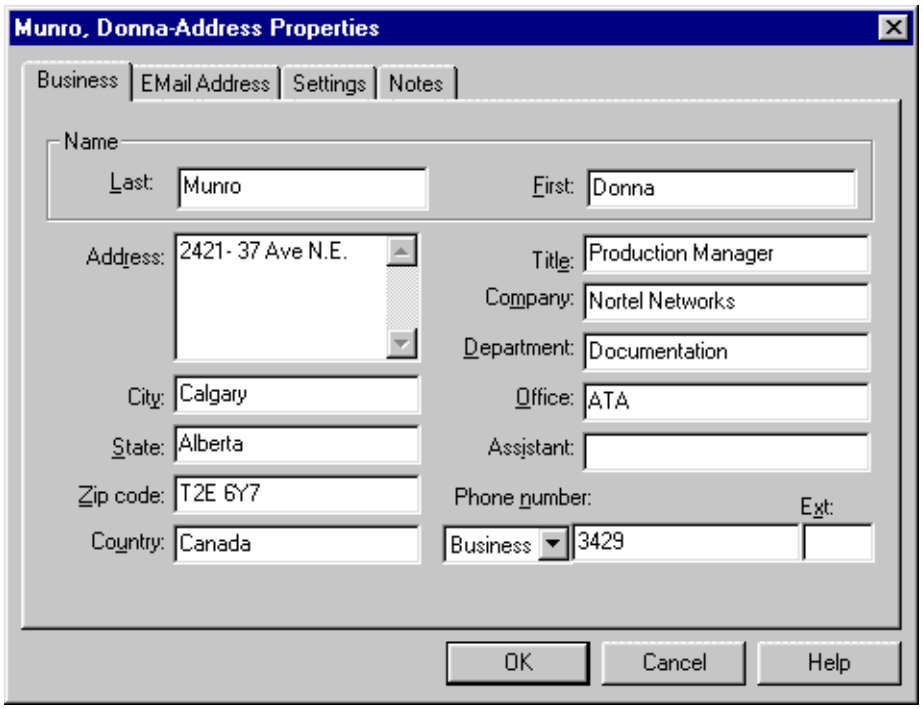
Address Properties dialog box

The Address Properties dialog box has four tabs. Use each tab to enter different types of contact information.

- **Business** - Use this tab to enter the name, address, and telephone number of the contact.
- **EMail Address** - Use this tab to enter the e-mail address and type.
- **Settings** - Use this tab to enter the default telephone number.
- **Note** - Use this tab to enter any other information about the contact.

Business

Use the Business tab to enter the name, address, and telephone number of a contact.



The first information you enter is the contact's name. The contact's name is divided into the first name and the last name. Both the first name and the last name must be entered before a contact can be added to the Address Book. The last name is used as the label for the contact in the Address Book. The first name is used as the label in the Calls box when you are on a call to the contact. When you search for a contact, you can search using the first name or the last name.

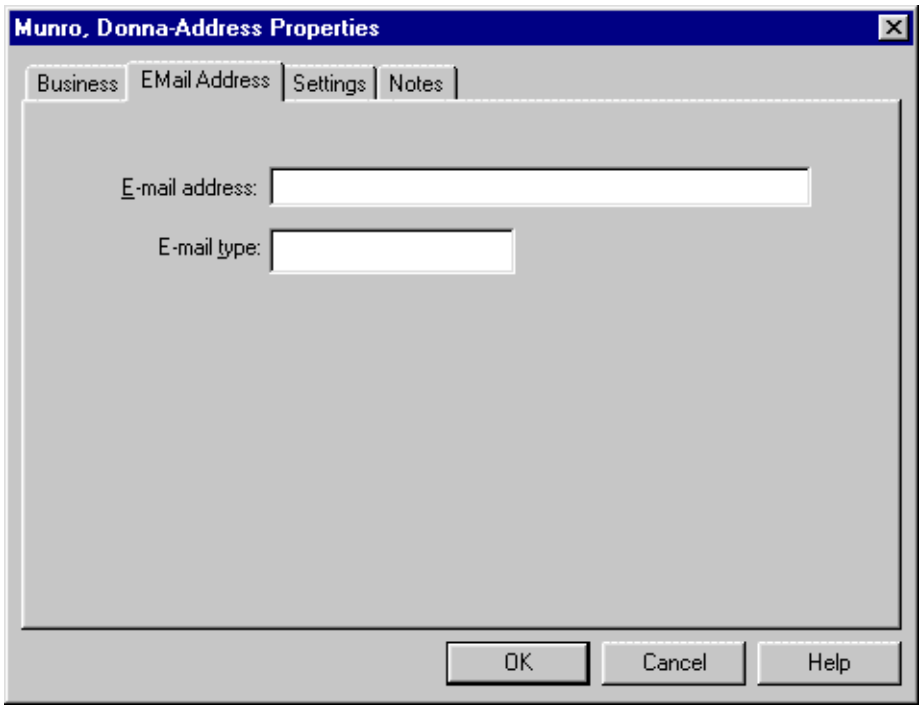
After you enter the name you can enter the contact's address. There are five different boxes for the address: Address, City, State, Zip code, and Country.

After entering the address, you can enter the Title, Company, Department, Office, and Assistant of the contact.

The final information to enter is the contact's telephone numbers. The Phone number box has a list box that allows you to enter four different telephone numbers. You can enter the Business, Home, Mobile, and Fax telephone numbers for the contact. Either the Business, Home, or Mobile telephone number can be dialed from the task tray or the Personal Call Manager window.

E-Mail Address

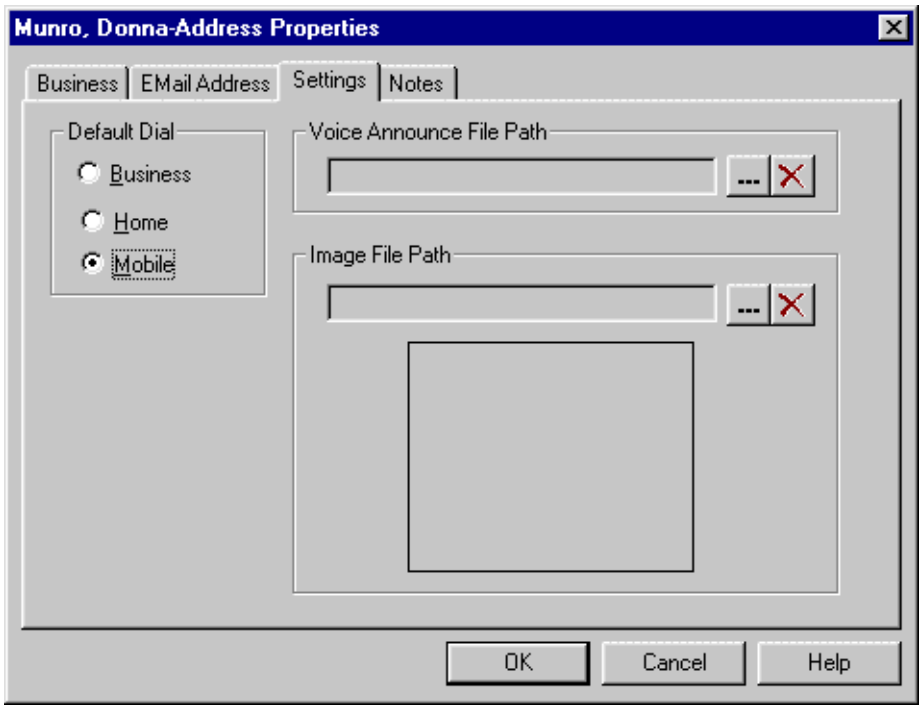
The E-Mail Address tab has two boxes: E-mail address and E-mail type.



E-mail address specifies where the contact's E-mail account is. E-mail type specifies which type of E-mail service the contact uses.

Settings

Use the Settings tab to select the dialing default used for the contact and the picture displayed and voice announcement heard when this contact calls you.



For the default telephone number dialed, you can choose Business, Home, or Mobile. The settings you specify define the telephone number automatically used for this contact only. Other contacts are not affected by the defaults you choose for this contact. You can choose to override these settings when making a call by selecting any other telephone number defined for the contact in the Address Book.

You can select a voice announcement to play when you receive a call from this contact. This voice announcement allows you to identify who is calling without having to look at the computer screen or telephone display.

To add or change the voice announcement for this contact:

1 Record the voice announcement message you want to play when this contact calls and save it in a .WAV file format. The message is typically the contact's name, but can be any.WAV file.

Note: You can record the voice announcement using the Sound Recorder accessory included with Windows 95 or any other sound editing application.

2 Click ... beside the **Voice Announce File Path** field.

3 Move to the folder where the voice announcement file is stored.

4 Double-click the voice announcement file you want to use.

If you decide you no longer want a voice announcement for this contact, you can remove the voice announcement from the contact.

To remove the voice announcement:

1 Click beside the **Voice Announce File Path** field.
The voice announcement no longer plays for this contact.

Note: The .WAV file you delete from the contact is not deleted from the computer hard drive and can be used again later.

You can select an image that displays on the You Have a New Call dialog box when you receive a call from this contact. This image gives you a visual reminder of who the caller is. The image is typically a picture of the contact, but can be any image that reminds you of the contact.

Note: You must use a 16-color or 256-color bitmap file (*.bmp) as the image for the contact.

To add or change the bitmap image:

1 Create or find the image you want to display when this contact calls. You can create this file with any graphics application that saves the image as a .BMP file.

2 Click beside the **Image File Path** field.

3 Move to the folder where the image file is stored.

4 Double-click the image file you want to use.

If you decide you no longer want Personal Call Manager to display an image when this contact calls, you can remove the image file from the contact.

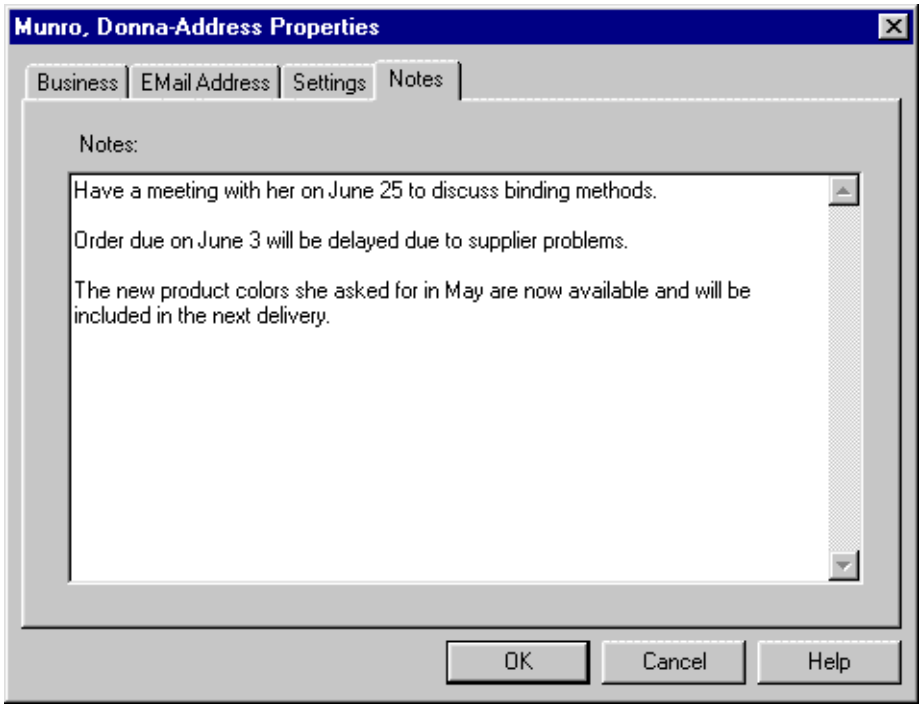
To remove the image file:

1 Click beside the **Image File Path** field.
The image file no longer appears for this contact.

Note: The .BMP file you delete from the contact is not deleted from the computer hard drive and can be used again later.

Note

Use the Note tab to record miscellaneous information about the contact. You can enter significant dates, recent orders, meeting locations or any information you want handy when you call the contact.



Adding a caller to the Address Book

When you receive a call, you can add the caller to your Address Book. You must open the Personal Call Manager window before you add a caller.

To add a caller:

1. Click the caller's icon in the **Calls** box.
2. Click .
   A dialog box appears asking you if you want to create a new contact.
3. Click the **Yes** button.
   The Address Properties dialog box appears.
4. Enter the address information for this contact.
   For descriptions of the address fields refer to "Address Properties dialog box" on page 58.
5. Click the **OK** button.
   The contact is added to the folder shown in the List View of the Address Book.

Note: If you subscribe to Caller ID service, the telephone number, and name if available, are automatically entered into the dialog box.

Finding a contact in the Address Book

The Address Book has a search feature to help you find a contact. You can search for a contact using the contact's name or telephone number.

The Search feature operates in two different modes: Slow Search and Quick Search. In Slow Search mode, you enter the characters you want to find and click the **Find Now** button. Personal Call Manager searches the Address Book to find the contact. In Quick Search mode, Personal Call Manager starts searching through contacts as soon as you type a character.

To change the Search mode used, refer to "Changing the Search preferences" on page 83.

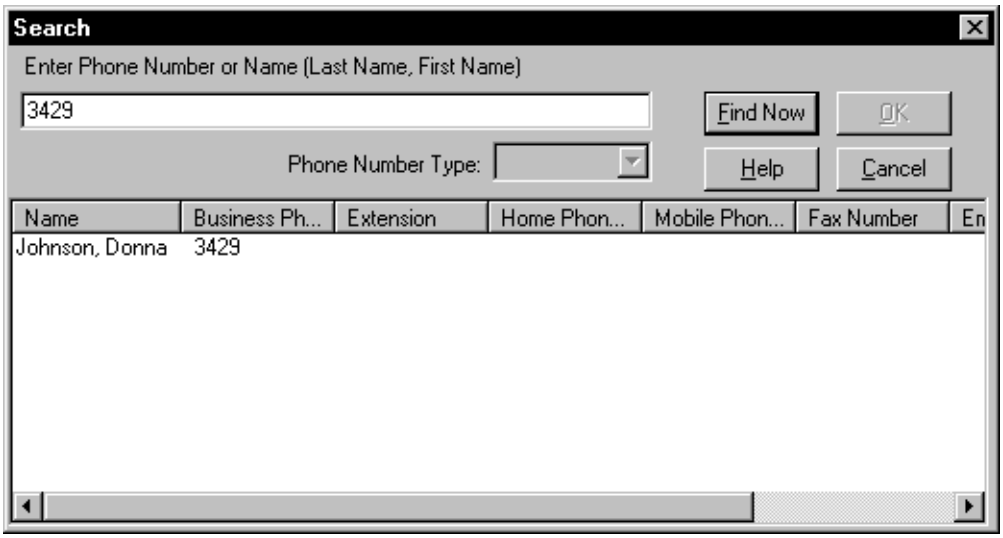
Slow Search

To find a contact:

1 Click the **Tools** menu and then click **Find Person**.

or
Click .

The Search dialog box appears.



2 Type the name or telephone number of the contact you want to find.

3 Click the **Find Now** button.
A list of the contacts that match the name or number you entered appears in the Search dialog box.

4 Click the last name of the contact you want.

5 Click the **OK** button.
The folder containing the contact opens and the selected contact is highlighted.

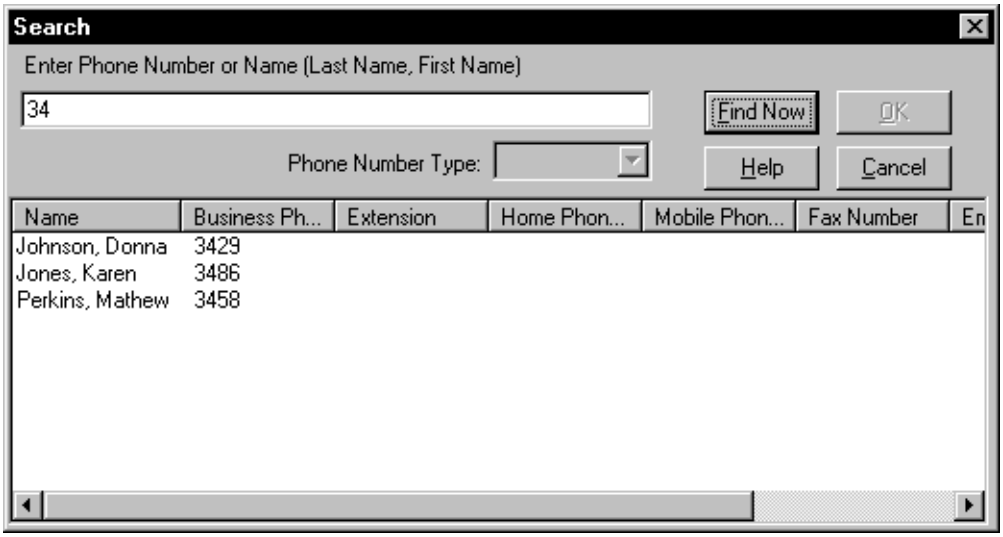
Quick Search

To find a contact:

1 Click the **Tools** menu and then click **Find Person**.

or
Click .

The **Search** dialog box appears.



2 Enter the first character of the name or telephone number of the contact you want to find. Personal Call Manager compares the letter or number you entered to the contacts stored in the Address Book. Any contacts that match the character you entered appear in the bottom of the **Search** dialog box.

If you have several contacts starting with that character, enter the next character in the name or telephone number. Personal Call Manager then displays only the contacts that match both of those characters.

3 Continue entering characters scroll to find the contact in the Search dialog box.

4 Click the last name of the contact you want.

5 Click the **OK** button.
The folder containing the contact opens and the selected contact is highlighted.

Entering names or numbers

If you know only part of the name or telephone number of the contact you want to find, you can type the letters or digits you know and the Search feature finds any contacts that match the information you enter.

If the portion of the name or number you know is at the beginning, type the portion you know and click the **Find Now** button. Personal Call Manager finds any contacts that start with the letters or digits you enter.

If you remember the contact's first name, but not last name, type a comma followed by the contact's first name. For example, if you are looking for a contact named Tom, type ",Tom". All of the contacts whose first name is Tom are found.

If the portion you know is not at the start, you can use "wild card" characters at the start of the name or number. There are two wild card characters you can use:

? Use the question mark to represent any single character.

***** Use the asterisk to represent any characters that precede the characters you entered.

For example, the following names are in the Address Book:

Chatterton Jones Mason Smith Stanley Steward Washington

- If you enter "S" the names found are Smith, Stanley and Steward.
- If you enter "Ste" the only name found is Stewart.
- If you enter "?a" the names found are Mason and Washington.
- If you enter "??a" the names found are Chatterton and Stanley.
- If you enter "*a" the names found are Chatterton, Mason, Stanley, Steward, and Washington.

Note: You can also enter a comma (,) as a special character. This special character adds a pause between the numbers dialed.

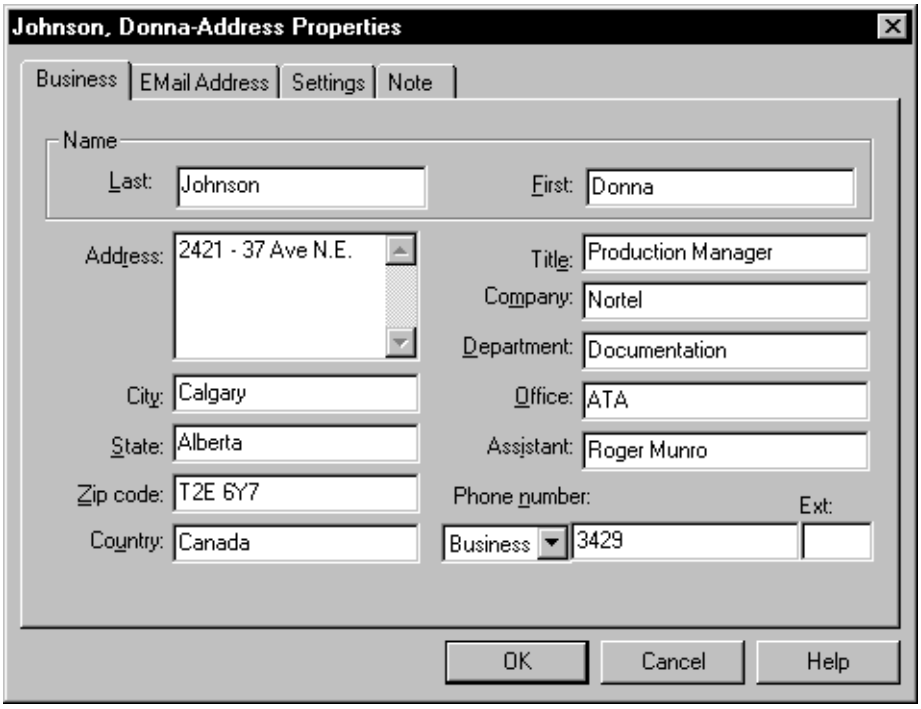
Editing the properties of a contact

The information stored with a contact can be changed whenever required. A typical example is when a contact moves or changes telephone numbers.

To change the properties of a contact using the right mouse button:

1 Find the contact in the Address Book.
You can find the contact manually or use the Personal Call Manager Search feature.

2 Right-click the contact and then click **Properties**.
The **Address Properties** dialog box appears.



3 Click the tab that has the information you want to change and then make the changes.

"Adding a new contact to the Address Book" on page 57 describes the information that can be entered.

To change the properties of a contact using the toolbar:

1 Find the contact in the Address Book.
You can find the contact manually or use the Personal Call Manager Search feature.

2 Click the contact.

3 Click .
The Address Properties dialog box appears.

4 Move to the tab that has the information you want to change and then make the changes.

"Adding a new contact to the Address Book" on page 57 describes the information that can be entered.

To change the properties of a contact using the Menu bar:

1. Find the contact in the Address Book.
   You can find the contact manually or use the Personal Call Manager Search feature.
2. Click the contact.
3. Click the **File** menu and then click **Properties**.
   The **A**ddress Properties dialog box appears.
4. Click the tab that has the information you want to change and then make the changes.

"Adding a new contact to the Address Book" on page 57 describes the information that can be entered.

Organizing the Address book

As you add contacts to the Address Book, divide the contacts into logical groups. This makes it easier for you to find the contacts you enter.

You group the contacts together by adding folders to the Address Book and moving your contacts into the appropriate folders. A simple example is to add two folders, one named Personal and one named Business. All of your business contacts are then stored in the Business folder and all of your personal contacts are stored in the Personal folder. For more information, refer to "Creating a new folder in the Address Book" on page 74.

Copying a contact

When you copy a contact, you create a new contact in the Address Book based on the original contact. Personal Call Manager provides two ways to copy a contact: a linked copy and a template copy. In the linked copy, all of the information about the contact is copied. In a template copy, all of the information about the contact except the contact name is copied. In both methods of copying, the original contact remains in the original folder.

Deciding which copy method to use

The copy method you choose depends on what you want to do. Refer to the table below to decide which copy method to use.

Table 2 Copy Methods

	Linked Copy	**Template Copy**
Information copied	The new contact contains the exact same information as the original contact.	The new contact has a different name than the original contact. The other contact information is the same.
Changes are linked	Yes. When you change one of the properties of the contact, Personal Call Manager automatically updates the original contact and all of the copies of the contact.	No. When you change one of the properties of the contact, the other copies are not changed.
Purpose	Use a linked copy when you want to have identical copies of a single contact in several different folders. You do this to make the contact easier to find and organize.	Use a template copy to create a new contact that is similar, but not identical to, an existing contact.
Example	You know a person who is your sales representative and a member of your baseball team. Put the original contact in your Business folder and make a linked copy of the contact in your Personal folder. You can then find contact information for this person when you are looking for sales representatives or baseball players. If this person's telephone number changes, you can change either copy of the contact and both copies are updated.	A new person joins a company you that you already have a contact for. The address and telephone number of the new contact is the same as the existing contact, but the name is different. To make a contact for the new person, make a copy of the existing contact and change the name.

For information about how to make a linked copy of a contact, refer to "Copying a contact using the linked copy method" on page 69.

For information about how to make a template copy of a contact, refer to "Copying a contact using the template copy method" on page 70.

Copying a contact using the linked copy method

Use this method of copying a contact when you want to create a copy that is linked to the original contact. For information about the two different methods of copying a contact, refer to "Deciding which copy method to use" on page 69.

To copy a contact using drag and drop, the contact must be visible in the List View and the folder you are copying it to must be visible in the Tree View. To copy a contact:

1. Press and hold the **Control** key on your PC keyboard.
2. Drag the contact you want to copy to the new folder.

To copy a contact using the toolbar:

1. Click the contact you want to copy.
2. Click .
3. Open the folder you want to copy the contact into.
   The contents of the folder appear in the List View box.
4. Click .
   The contact is copied to the new folder.

To copy a contact using the right mouse button:

1. Right-click the contact you want to copy and then click **Copy**.
2. Open the folder you want to copy the contact into.
   The contents of the folder appear in the List View box.
3. Right-click an open area in the folder and then click **Paste**.
   The contact is copied to the new folder.

To copy a contact using the Menu bar:

1. Click the contact you want to copy.
2. Click the **Edit** menu and then click **Copy**.
3. Open the folder you want to copy the contact into.
   The contents of the folder appear in the List View box.
4. Click the **Edit** menu and then click **Paste**.
   The contact is copied to the new folder.

Copying a contact using the template copy method

Use this method of copying a contact when you want to create a new contact that is based on an existing contact. All of the contact information except the contact name is copied to the new contact. This feature allows you to quickly add contacts that are similar to existing contacts. For information about the two different methods of copying a contact, refer to "Deciding which copy method to use" on page 69.

To copy a contact using the right mouse button:

1. Right-click the contact you want to copy and then click **Copy**.
2. Open the folder you want to copy the contact into.
   The contents of the folder appear in the List View box.
3. Right-click one of the contacts in the folder.
   The contact click is not affected by the pasting procedure.
4. Click **Paste Special**.
   You are prompted to enter a name.

5 Type the name of the contact and click the **OK** button.

After the contact is copied into the folder, you can open the contact properties and change any properties.

To copy a contact using the Menu bar:

1 Click the contact you want to copy.

2 Click the **Edit** menu and then click **Copy**.

3 Open the folder you want to copy the contact into.
The contents of the folder appear in the List View box.

4 Click the **Edit** menu and then click **Paste Special**.
You are prompted to enter a name.

5 Type the name of the contact and click the **OK** button.

After the contact is copied into the folder, you can open the contact properties and change any properties.

Moving a contact

Contacts can be moved from one folder to another to help organize the Address Book. When you move a contact, the contact does not remain in the original folder.

To move a contact using drag and drop, the contact must be visible in the List View and the folder you are moving it to must be visible in the Tree View. To move a contact:

1 Drag the contact you want to copy to the new folder.

To move a contact using the toolbar:

1 Click the contact you want to move.

2 Click .
The icon for the contact dims.

3 Open the folder you want to move the contact into.
The contents of the folder appear in the List View box.

4 Click .
The contact is moved to the new folder.

To move a contact using the right mouse button:

1 Right-click the contact you want to move and then click **Cut**.
The icon for the contact dims.

2 Open the folder you want to move the contact into.
The contents of the folder appear in the List View box.

3 Right-click an open area in the folder and then click **Paste**.
The contact is moved to the new folder.

To move a contact using the Menu bar:

1. Click the contact you want to move.
2. Click the **Edit** menu and then click **Cut**.
   The icon for the contact dims.
3. Open the folder you want to move the contact into.
   The contents of the folder appears in the List View box.
4. Click the **Edit** menu and then click **Paste**.
   The contact is moved to the new folder.

Note: After you use the Cut command (indicated by the contact icon dimming), you must use the Paste command to move the contact before using the Cut or Copy commands again. If you use the Cut or Copy command before pasting the contact, the contact remains in the original folder and does not move.

Deleting a contact

To delete a contact using the right mouse button:

1. Right-click the contact you want to delete and then click **Delete**.

To delete a contact using the Menu bar:

1. Click the contact you want to delete.
2. Click the **Edit** menu and then click **Delete**.

To delete a contact using the keyboard:

1. Click the contact you want to delete.
2. Press the **Delete** key.

Printing Contacts

There are two printing formats you can use to print information about any of the contacts stored in the Address Book. You can print a contact list or contact details.

Printing a contact list

When you print a contact list, the name, company, and telephone numbers stored in the Address Book for the contact are printed. You can print contact list information for one or many contacts.

Note: When printing a contact list, set your page orientation to landscape.

To print a contact list:

1 Click the contacts you want.

Note: Use the Control or Shift keys to select more than one contact.

2 Click the **File** menu and then click **Print Contact List**.

or

Click .

3 Click the **OK** button.

To print a contact list for all of the contacts in a folder:

1 Click the folder or folders that contain the contacts you want to print.

Note: Use the Control or Shift keys to select more than one folder.

2 Click the **File** menu and then click **Print Contact List**.

or

Click .

3 Click the **OK** button.

Print Contact Details

When you print the contact details, all the information in the Address Book for the selected contact is printed. You can print contact detail information for one or many contacts.

To print contact details:

1 Click the contact or contacts you want.

Note: Use the Control or Shift keys to select more than one contact.

2 Click the **File** menu and then click **Print Contact Detail**.

Folders

Folders can be added only to the My Contacts section and the folders in the My Contacts section. You cannot add folders to the Quick Dials section. For more information on, refer to "Quick Dials" on page 80.

Creating a new folder in the Address Book

To create a new folder using the right mouse button:

1. Click a folder in the Tree View of the Address Book.
   The contents of the selected folder appear in the List View. The new folder is added to this folder.
2. Right-click an open area in the List View.
3. Point to **New** and then click **Folder**.
   The Create New Folder dialog box appears.
4. Type the name of the new folder and then click the **OK** button.
   The new folder is added to the selected folder.

   When naming the new folder, you must use a name that does not already exist in the selected folder.

To create a new folder using the toolbar:

1. Click a folder in the Tree View of the Address Book. The contents of the selected folder appear in the List View. The new folder is added to this folder.
2. Click .
   The Create New Folde**r** dialog box appears.
3. Type the name of the new folder and then click the **OK** button.
   The new folder is added to the selected folder.

   When naming the new folder, you must use a name that does not already exist in the selected folder.

To create a new folder using the Menu bar:

1. Click a folder in the Tree View of the Address Book. The contents of the selected folder appear in the List View. The new folder is added to this folder.
2. Click the **File** menu, point to **New** and then click **Folder**.
   The Create New Folder dialog box appears.
3. Type the name of the new folder and then click the **OK** button.
   The new folder is added to the selected folder.

   When naming the new folder, you must use a name that does not already exist in the selected folder.

Copying a folder

When you copy a folder, the folder and all of the contacts and folders contained in the folder are copied to the new folder.

To copy a folder using drag and drop, the folder must be visible in the List View and the folder you are moving it to must be visible in the Tree View. To copy a folder:

1. Press and hold the **Control** key on your PC keyboard.
2. Drag the folder you want to copy to the folder you want it copied to.

The folder must be in the List View box to use the right mouse button. To copy a folder using the right mouse button:

1. Right-click the folder you want to copy and then click **Copy**.
2. Open the folder you want to copy the folder to.
   The contents of the folder appear in the List View box.
3. Right-click an open area in the List View box and then click **Paste**.

To copy a folder using the toolbar:

1. Click the folder you want to copy.
2. Click .
3. Open the folder you want to copy the folder to.
   The contents of the folder appear in the List View box.
4. Click .

To copy a folder using the Menu bar:

1. Click the folder you want to copy.
2. Click the **Edit** menu and then click **Copy**.
3. Open the folder you want to copy the folder to.
   The contents of the folder appear in the List View box.
4. Click the **Edit** menu and then click **Paste**.

Moving a folder

Folders can be moved from one enclosing folder to another. When you move a folder, you move the folder and all of the contacts and folders that it contains.

To move a folder using drag and drop, the folder must be visible in the List View and the folder you are moving it to must be visible in the Tree View. To move a folder:

1 Drag the folder you are moving to the folder you want it moved to.

To move a folder using the toolbar:

1 Click the folder you want to move.
2 Click .
3 Open the folder you want to move the folder to.
The contents of the folder appear in the List View box.
4 Click .

The folder must be in the List View box to use the right mouse button. To move a folder using the right mouse button:

1 Right-click the folder you want to move and then click **Cut**.
2 Open the folder you want to move the folder to.
The contents of the folder appear in the List View box.
3 Right-click an open area in the folder and then click **Paste**.

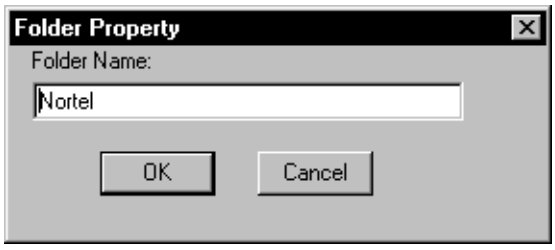
To move a folder using the Menu bar:

1 Click the folder you want to move.
2 Click the **Edit** menu and then click **Cut**.
3 Open the folder you want to move the folder to.
The contents of the folder appear in the List View box.
4 Click the **Edit** menu and then click **Paste**.

Renaming a folder

To change the name of a folder using the right mouse button:

1. Right-click the folder you want to rename and then click **Properties**.
   The Folder Property dialog box appears.



2. Type the new name of the folder and then click the **OK** button.

To change the name of a folder using the toolbar:

1. Click the folder you want to rename.
2. Click .
   The Folder Property dialog box appears.
3. Type the new name of the folder and then click the **OK** button.

To change the name of a folder using the Menu bar:

1. Click the folder you want to rename.
2. Click the **File** menu and then click **Properties**.
   The Folder Property dialog box appears.
3. Type the new name of the folder and then click the **OK** button.

Deleting a folder

When you delete a folder, the folder and all the contacts and folders contained in the folder are deleted.

To delete a folder using the right mouse button:

1. Right-click the folder you want to delete and then click **Delete**.
2. Click the **OK** button to confirm deleting the folder and its contents.

To delete a folder using the Menu bar:

1. Click the folder you want to delete.
2. Click the **Edit** menu and then click **Delete**.
3. Click the **OK** button to confirm deleting the folder and its contents.

Importing Contacts

If you have a list of contacts in another application, you can save your list of contacts as a text file and then import those contacts into Personal Call Manager.

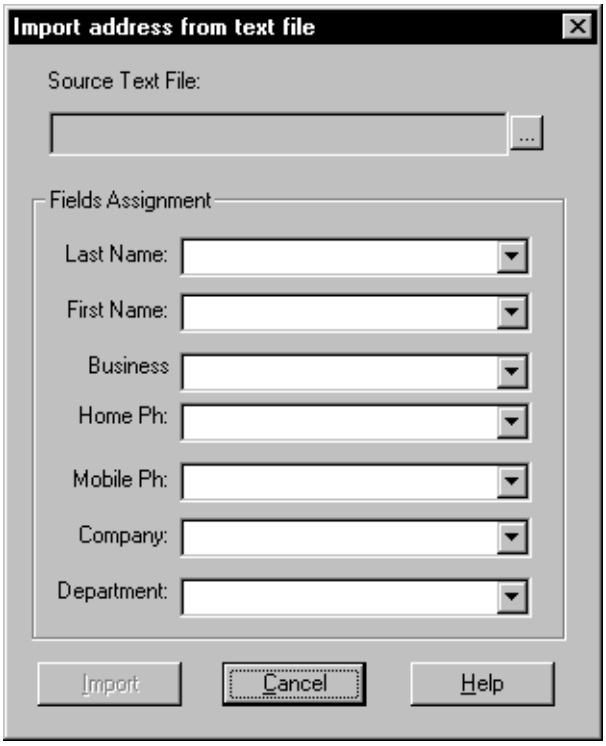
To import addresses:

1 Open the application that contains your existing contact list and save the list as a comma delimited text file. Make a note of the order of the information fields in the existing file.

Note: Refer to the documentation that came with the application for instructions on how to save the contact list as a comma delimited text file.

2 Open the Personal Call Manager window.

3 Click the **File** menu and then click **Import Address**.
The Import address from text fil**e** dialog box appears.



4 Click ... to choose the file you want to import.
The Open dialog box appears.

5 Move to the folder that contains the file you want to import.

6 Double-click the file you want to import.
The Import address from text file dialog box appears with the path and file name in the Source Text File field.

7 Click the list box of one of the information fields (for example, Last Name) and then click the text that corresponds to that information field (for example. the last name of the contact).

8 Repeat step 7 for each of the information fields. Choose **None** if the information for the field is not in the file you are importing.

9 Click the **Import** button.

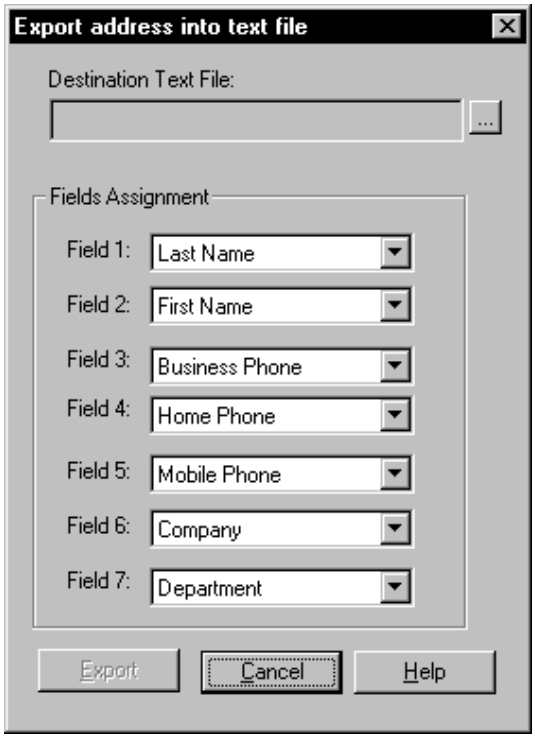
The contacts from the text file are added to your Address Book. You can now move the new contacts into their folders.

Exporting Contacts

You can save all of the contacts in your Address Book into a comma delimited text file. You can use this file in other applications. For example, you can add your contacts to a customer database or use the contacts to create a mailing list.

To export contacts:

1 Click the **File** menu and then click **Export Address**.
The Export address into a text file dialog box appears.



2 Click ... to enter the name of the text file.
The Save as dialog box appears.

3 Move to the folder you want to store the text file in.

4 In the **File name** box type the file name.

5 Click the **Save** button.
The Export address into text file dialog box appears with the path and file name in the Destination Text File field.

6 In the **Field 1** list box select the information you want to appear in the first field of the text file (e.g. Last Name).
Repeat step 6 until all of the fields show the information you want. For any field you do not want information in, click **None**.

Note: Only one type of information can appear in each box.

7 Click the **Export** button.

All the contacts in the Address Book are saved to a comma delimited text file.

Quick Dials

The Address Book is divided into two mains sections: My Contacts and Quick Dials. The My Contacts section stores your contacts. The Quick Dials section used stores contacts that you use frequently or need to access quickly.

The contacts you add to the Quick Dials section are automatically added to the **Quick Dials** menu. You can access the Quick Dials menu from the Calls menu or the Personal Call Manager task tray menu.

Adding Quick Dials

To add a Quick Dial, add the contact to the Quick Dials section of the Address Book. Any of the methods described earlier to add a contact can be used to add Quick Dials.

Displaying the information about Personal Call Manager

The About Personal Call Manager window shows the version number of the Personal Call Manager software you are using.

To access the About Personal Call Manager window:

1 Click the **Help** menu and then click **About PCM**.

or

1 Click .

Synchronization with the telephone

Common call control operations can be performed on either the telephone or on Personal Call Manager. For example, to end a call you can press the Rls (Release) key on the telephone or click **Release** in Personal Call Manager.

Any telephone programming you use to customize your telephone is not synchronized. For example, the personal speed dials programmed on the telephone are not automatically copied into Personal Call Manager.

Accessing Help

Accessing context-sensitive Help

You can access context-sensitive Help by pressing the **F1** key. The Help information that appears is about the currently active window, dialog box or menu item.

Opening the Help contents screen

You can access Help from the Menu bar. To access the Help window:

1 Click the **Help** menu and then click **Help topics**.

The main Help window gives you access to all of the help information.

Use the Contents tab to view the Help topics. To go to one of the topics, double-click the topic.

Use the Index tab to view an alphabetically sorted list of Help topics. The topics on the Index tab are more detailed than the topics on the Contents tab. To go to a topic, click the topic.

Use Find tab to enter a word or topic you need help information about. The Find feature searches through the Help information and displays information about the word or topic you enter.

Accessing the Tip of the Day

The Tip of the Day window shows helpful information about how to use Personal Call Manager.

To display the Tip of the Day window:

1 Click the **Help** menu and then click **Tip of the Day**.

Turning the Tip of the Day off

The Tip of the Day window appears when you start Personal Call Manager.

To turn the Tip of the Day off:

1. Click the **Help** menu and then click **Tip of the Day**.
2. Clear the **Show Tips at Startup** check box.

When the Show Tips at Startup check box is empty, the Tip of the Day window does not appear when you start Personal Call Manager.

Turning the Tip of the Day on

To turn the Tip of the Day on:

1. Click the **Help** menu and then click **Tip of the Day**.
2. Select the **Show Tips at Startup** check box.

When the Show Tips at Startup check box contains a check mark, the Tip of the Day window appears when you start Personal Call Manager.

Personal Call Manager Preferences

Personal Call Manager preferences determine how the Address Book is searched, how Personal Call Manager appears when you start it up, and whether the dialing rules are used.

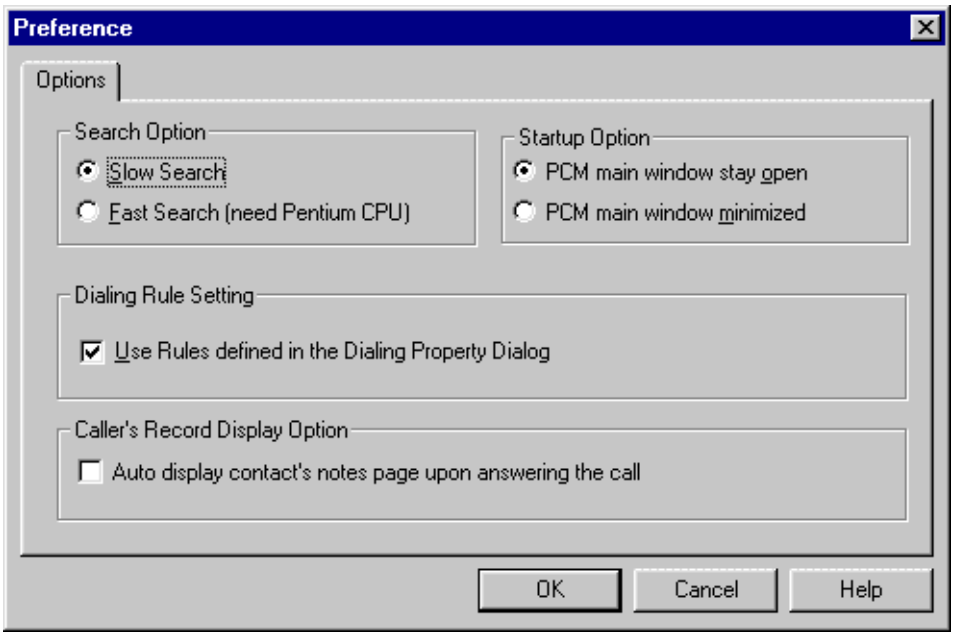
Changing the Search preferences

The Search feature operates in one of two different modes: Slow Search and Quick Search. In Slow Search mode, you type the characters you want to find and click the **Find Now** button. Personal Call Manager searches through the Address Book to find the contact. In Quick Search mode, Personal Call Manager starts searching through the contacts as soon as you type a character.

Note: If you plan on using the Quick Search mode, your computer must have a Pentium processor or better. If you use a slower processor, Fast Search is slower.

To change the Search mode from the Menu bar:

1 Click the **Tools** menu and then click **Options**.
The Options dialog box appears.



2 Click the Search Option you want to use.

To change the Search mode from the task tray:

1 Right-click the Personal Call Manager task tray icon and then click **Options**.
The Options dialog box appears.

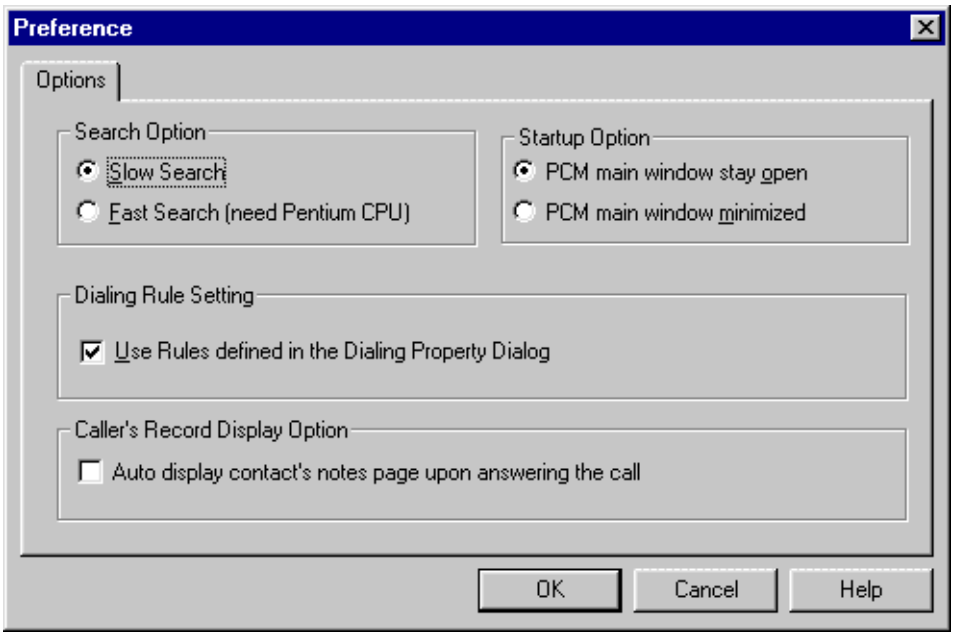
2 Click the Search Option you want to use.

Changing the Startup Option

The Startup Option determines if the window is open or minimized when you start Personal Call Manager.

To change the Startup Option from the Menu bar:

1. Click the **Tools** menu and then click **Options**.
   The Options dialog box appears.



2. Click the Startup Option you want to use.

To change the Startup Option from the task tray:

1. Right-click the Personal Call Manager task tray icon and then click **Options**.
   The Options dialog box appears.
2. Click the Startup Option you want to use.

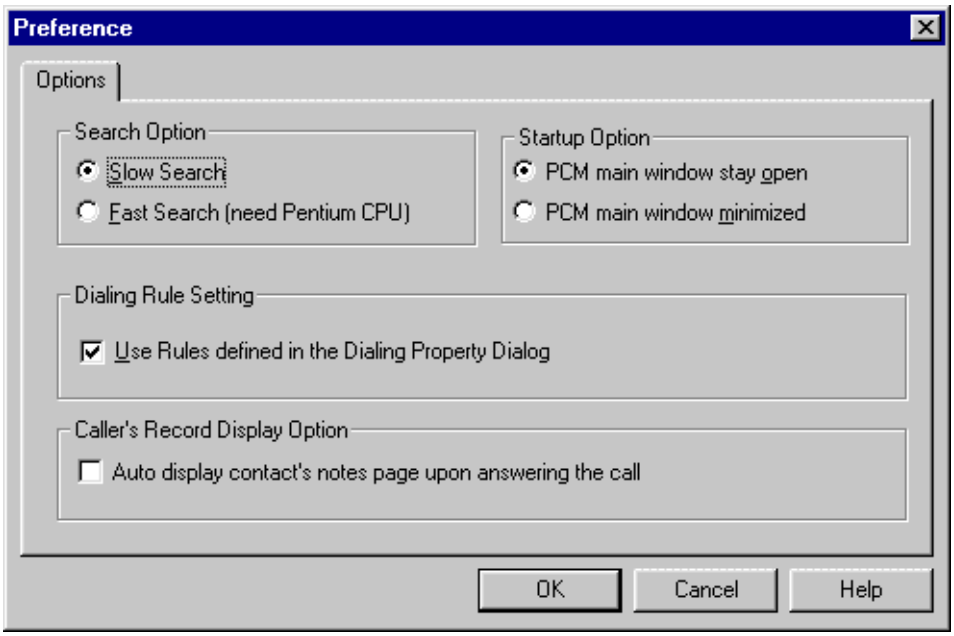
Changing the Dialing Rule Setting

The Dialing Rule Setting determines if the dialing properties entered in the Dialing Properties dialog box are used. This feature is enabled by default.

When the Dialing Rule Setting is enabled, Personal Call Manager uses dialing properties, such as the local area code and the outside line access code, when making a call. When the Dialing Rule Setting is disabled, Personal Call Manager does not use the dialing properties and you must manually enter any additional dialing information, such as the outside line access code.

To change the Dialing Rule Setting from the Menu bar:

1 Click the **Tools** menu and then click **Options**.
The Options dialog box appears.



2 Click the **Use Rules defined in the Dialing Property Dialog** check box to change the setting.

To change the Dialing Rule Setting from the task tray:

1 Right-click the Personal Call Manager task tray icon and then click **Options**.
The Options dialog box appears.

2 Click the **Use Rules defined in the Dialing Property Dialog** check box to change the setting.

Changing the Caller's Record Display Setting

When the Caller's Record Display Setting is on, Personal Call Manager compares the incoming telephone number to the entries in the Address Book. If a match is found, the Notes tab of the **Address Properties** dialog box appears showing the information for the caller. If a match is not found, a message appears asking if you want to add the caller to the Address Book.

Personal Call Manager receives the incoming telephone number only if:

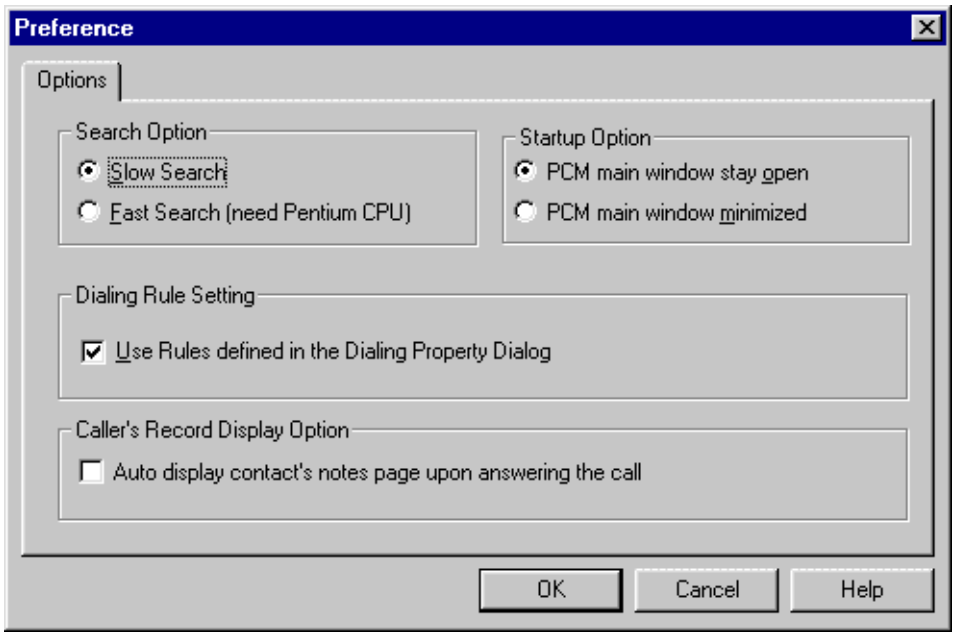
- You subscribe to a Caller ID (CLID) service.

  or

- You are receiving an internal call through Business Communications Manager.

To change Caller's Record Display Setting from the Menu bar:

1. Click the **Tools** menu and then click **Options**.
   The Options dialog box appears.



2. Click the **Auto display contact's notes page upon answering the call** check box to change the setting.

To change the Dialing Rule Setting from the task tray:

1. Right-click the Personal Call Manager task tray icon and then click **Options**.
   The Options dialog box appears.
2. Click the **Auto display contact's notes page upon answering the call** check box to change the setting.

Quitting Personal Call Manager

You can quit Personal Call Manager from the task tray or the window.

To quit Personal Call Manager using the task tray:

1 Right-click the Personal Call Manager task tray icon and then click **Exit**.

To quit Personal Call Manager using the window:

1 Click the **File** menu and then click **Exit**.

You can also quit Personal Call Manager by clicking the close button in the upper right corner of the Personal Call Manager window.

Removing Personal Call Manager

You can remove Personal Call Manager from your computer. For example, if you get a new computer you want to move Personal Call Manager to the new computer. The Uninstall program makes sure all of the files that comprise Personal Call Manager are removed from the computer hard disk.

Note: If you are moving Personal Call Manager to a new computer, make a copy of the PCMAddressBook.mdb file before you remove Personal Call Manager. (Use **Find** or look in the Nortel Networks folder.) You can then copy this file to the new computer where Personal Call Manager is installed. This copies all of the contacts you have added to the Address Book to the new computer.

To remove the Personal Call Manager software:

1 Make sure you have quit Personal Call Manager.

2 Click the Windows **Start** button, point to **Settings** and then click **Control Panel**.

3 Double-click the **Add/Remove Programs** icon.

4 Click **Personal Call Manager**.

5 Click the **Add/Remove** button.

All of the files associated with Personal Call Manager are removed from your computer hard drive.

Glossary

Address Book

The portion of Personal Call Manager where you store the telephone numbers and addresses of people and businesses.

Call Forward

A feature that forwards all the calls arriving at your telephone to another telephone.

Calling Line Identification (CLID)

A service provided by the telephone company that allows you to see the caller's telephone number and in some cases the caller's name. If you subscribe to this service, Personal Call Manager can then show you the caller's name or telephone number on the computer screen.

Contact

A contact is any entry in the Address Book. A contact can be a person, business, or any number or address you want stored in Personal Call Manager.

Dialing properties

The dialing properties define where you are situated and what is required to dial from this location.

Do Not Disturb

A feature that stops calls from ringing at your telephone. The You Have a New Call dialog box still appears.

Business Communications Manager TSP

The application that provides Personal Call Manager with access to the TAPI functions.

Extension name

The name used to identify your telephone on the Business Communications Manager system.

Handsfree

A feature you can use to make calls without using the telephone handset.

Icon

A graphic symbol used to represent an object (such a contact or call) or a task (such as manual dialing) in Personal Call Manager.

List View

The portion of the Address Book that shows the contacts and folders stored in the selected folder.

Menu bar

The menu bar shows the menus available from the main window.

PC (Personal Computer)

A Windows® compatible computer that runs the Personal Call Manager software.

Quick dials

A group of telephone numbers that you can call by selecting a menu item.

Status bar

An area at the bottom of the computer screen which provides information messages about Personal Call Manager.

TAPI

TAPI stands for Telephony Application Programming Interface. It is a set of programming tools that allows Personal Call Manager to communicate with the telephone system.

TAPI line

The telephone line that Personal Call Manager uses to make a call.

Task tray

An area in the bottom right hand corner of the PC screen. It contains the Personal Call Manager task tray icon which is used to perform several common call control functions.

Taskbar

An area at the bottom of the computer screen. It contains the Personal Call Manager taskbar icon that is used to maximize the Personal Call Manager Window or bring it to the foreground.

Tool bar

The tool bar contains several buttons that provide quick and easy access to Personal Call Manager functions.

Tree View

The portion of the Address Book that shows how the folders used to store the contacts are organized.

Wild card character

A special character that can be used represent any letter or number.

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